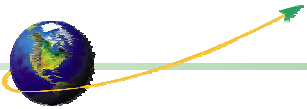


Travel and Tourism in Maine The 2002 Visitor Study

Prepared for the:
Maine Office of Tourism
February 22, 2004

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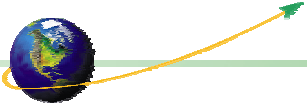


2002 Travel Year

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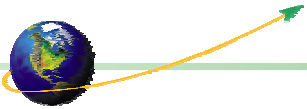
Background & Research Objectives

2002 Travel Year



- ⊙ A multi-component program of **Visitor Research** has been conducted each year since 1996 by Longwoods International for the Maine Office of Tourism.
- ⊙ The program is designed to provide:
 - ⊙ *an overview on the U.S. overnight travel market*
 - ⊙ *estimates of overnight and day visitor volumes to Maine*
 - ⊙ *a profile of Maine's performance within its regional overnight travel market*
 - ⊙ *visitor expenditures and economic impact estimates of travel and tourism in Maine*
 - ⊙ *profiles of Maine's overnight marketable trips and travelers.*

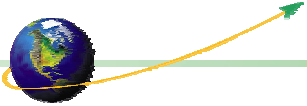
Research Method



2002 Travel Year

- ◉ The program is comprised of three research studies; they are the:
 - ◉ ***Travel USA Monitor®***
 - ◉ *surveys the travel patterns of a representative sample of American adults (i.e. number and types of overnight trips, destinations, month of travel, and traveler demographics) and then,*
 - ◉ *returns to a representative sub-sample of them to obtain a detailed profile of trip planning and booking, the travel party, transportation, accommodation, activities, and related expenditures,*
 - ◉ *provides the U.S. Norm for comparison of state-specific findings.*

Research Method cont'd



2002 Travel Year

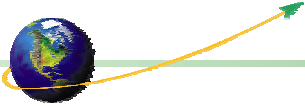
- ◉ **Maine Overnight Visitor Survey**

- ◉ *returns for detailed follow-up among the Maine overnight trip visitors, identified through **Travel USA®**, for state-specific learning.*

- ◉ **Maine Day Visitor Survey**

- ◉ *surveys a representative sample of residents in Maine's day trip market*
- ◉ *to profile the number and types of Maine day trips and related expenditures.*

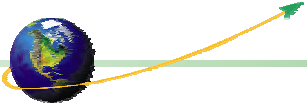
Trip-Type Segmentation Model



2002 Travel Year

- ◉ Reference is made to different types of trips in this report based on Longwoods' proprietary segmentation model.
- ◉ The model was developed and refined over 16 years, based on extensive consumer research, and allows for customized marketing strategies reflecting the unique profile, needs, and opportunities of a destination.
- ◉ The segments are:
 - ◉ *Visits to Friends and Relatives (VFR) where the primary purpose of the trip is to visit friends and family*
 - ◉ *Marketable Trips*
 - ◉ *Includes all other pleasure trips and are so-called because choice of destination on these trips is discretionary and open, therefore, to marketing influence*
 - ◉ *Comprised of eleven discrete types, as described on the following page*
 - ◉ *Business Trips made exclusively for business reasons*
 - ◉ *Comprised of three types: Sales/Service, Convention/Conference/Trade Shows, and Meetings.*

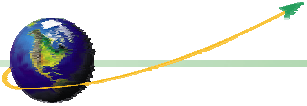
Marketable Trip-Types



2002 Travel Year

- ◉ **Touring:** Travel through areas of scenic, cultural or general interest
- ◉ **Special Event:** Attend an event such as a fair, sports event, or festival
- ◉ **Combined Business/Pleasure:** Business extended at least one night just for pleasure
- ◉ **City Trip:** Visit a city for sightseeing, culture, shopping, dining, theatre, etc.
- ◉ **Beach:** Visit to an ocean beach resort for swimming, boating, etc.
- ◉ **Theme Park:** A trip to visit a major theme park
- ◉ **Outdoors:** Visit a natural area for camping, fishing, hunting, etc.
- ◉ **Casino:** Visit to casino or casino resort for the purpose of gaming
- ◉ **Country Resort:** Visit to a country resort to relax, enjoy sports, recreation, etc.
- ◉ **Ski Trip:** Trip to a ski area or resort for downhill or cross-country skiing and snowboarding
- ◉ **Cruise:** Extended boat trip with on-board activities, stops for sightseeing, etc.

Markets of Interest

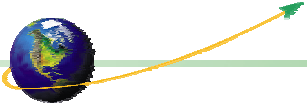


2002 Travel Year

- ◉ Maine's Regional Market
 - ◉ *Includes the New England states, Delaware, Maryland, New Jersey, New York, Pennsylvania, and Washington, D.C.*
- ◉ Maine's Day Trip Market
 - ◉ *Includes the states of Maine, Connecticut, Massachusetts, New Hampshire, Rhode Island, and Vermont.*

Summary and Conclusions

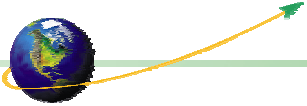
Maine's U.S. Travel Market



2002 Travel Year

- ◉ The travel and tourism industry continues to be a significant and growing contributor to Maine's economy.
- ◉ An estimated 43.8 million day and overnight trips were taken to Maine in 2002, representing 2% growth over 2001 and 12% cumulative growth versus 1997.
 - ◉ *Overnight trips accounted for 9.1 million of these, up 1% over 2001 and 10% higher than in 1997.*
 - ◉ *Day trips accounted for 34.7 million, up 2% over 2001 and 12% higher than in 1997.*

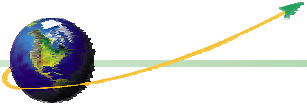
Travel Expenditures



2002 Travel Year

- ⊙ U.S. travelers spent an estimated \$6.2 billion in Maine in the year.
 - ⊙ *\$4.2 billion of these expenditures were spent by out-of-state travelers.*
- ⊙ The retail and food sector were the largest beneficiaries, capturing estimated \$2.0 and \$1.8 billion respectively, followed by:
 - ⊙ *transportation at \$1.0 billion, accommodations at \$0.7 and recreation at \$0.7 billion.*
- ⊙ Day and overnight trips are both significant contributors, generating estimated spending of \$3.6 and \$2.6 billion respectively.

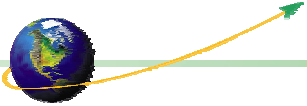
Economic Impact of Travel and Tourism



2002 Travel Year

- ⊙ Based on these levels of traveler spending, travel and tourism in Maine directly and indirectly generated -
 - ⊙ *181,090 jobs in Maine*
 - ⊙ *\$3.9 billion in wages*
 - ⊙ *over \$556 million in tax revenues.*
- ⊙ Spending by non-residents accounted for two-thirds of the above totals.

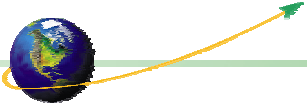
Maine's Market Position



2002 Travel Year

- ⊙ Maine's share of regional Marketable trips declined from 3.8% to 3.5% over the year.
 - ⊙ *It has been a consistent performer, in volume terms, over recent years ... especially its Marketable trip segment,*
 - ⊙ *while the regional and national markets have been more volatile and recovered in 2002 from depressed performance in 2001.*

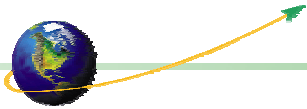
Overnight Marketable Travel Profile



2002 Travel Year

- ⊙ Marketable pleasure trips continued to dominate Maine's trip mix and the most important reasons among these for visiting were:
 - ⊙ *touring the state (38%)*
 - ⊙ *enjoying the outdoors (21%)*
 - ⊙ *for a beach vacation (12%)*
 - ⊙ *attending a special event (9%)*
- ⊙ Maine's most important source of overnight marketable trips continued to be its regional market.

Product Delivery

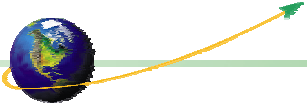


2002 Travel Year

- ◉ Maine has an outstanding tourism product. Visitors hold favorable impressions.
- ◉ The state's signature strengths relate to:
 - ◉ *providing a Family Atmosphere,*
 - ◉ *being Exciting, Unique, yet Worry-free*
 - ◉ *with Sightseeing as well as Sports & Recreation.*

Results in Detail

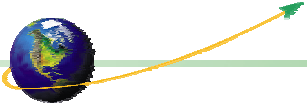
Performance of the U.S. Travel Market



2002 Travel Year

- ⊙ American adults took an estimated 1.51 billion overnight trips in 2002.
 - ⊙ *Visits to Friends/Relatives accounted for 41% or 615 million.*
 - ⊙ *Marketable Trips accounted for 40% or 614 million.*
 - ⊙ *Touring, Special Event, Outdoor, Casino, and Beach trips were, in rank order, the largest Marketable Trip types.*
 - ⊙ *Business Trips accounted for the balance 19% or 283 million trips.*

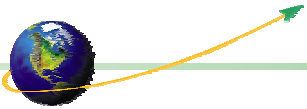
U.S. Travel Trends



2002 Travel Year

- ⊙ The 1.51 billion Overnight Trips represented 4% growth for the market and a re-bound after the 2% decline in 2001.
- ⊙ Pleasure travel drove the market.
 - ⊙ *VFR grew by 4%, building on 2% growth on 2001*
 - ⊙ *Marketable trips grew by 6%, after a 2% decline in 2001.*
 - ⊙ *Business-Pleasure, Beach, Touring, and Country Resort trip-types grew by even stronger rates.*
- ⊙ Business travel was soft for the third consecutive year.
 - ⊙ *It was flat in 2000, down 10% in 2001, and down 3% in 2002.*

U.S. Travel Trends cont'd



2002 Travel Year

- ⊙ This performance returned the overall market to its consistent record of growth across the years but for the softness of 2001.
 - ⊙ *The market volume of 1.51 billion trips in 2002 was 137 million trips or 10% higher than in 1997.*
- ⊙ This record of growth was driven by:
 - ⊙ *VFR: 45 million trips or 8% higher in 2002 than 1997;*
 - ⊙ *Marketable Trips: 95 million trips or 18% higher.*
- ⊙ It was tempered by:
 - ⊙ *Business Trips: 3 million trips or 1% lower in 2002 than 1997.*

Size of the U.S. Travel Market 2002

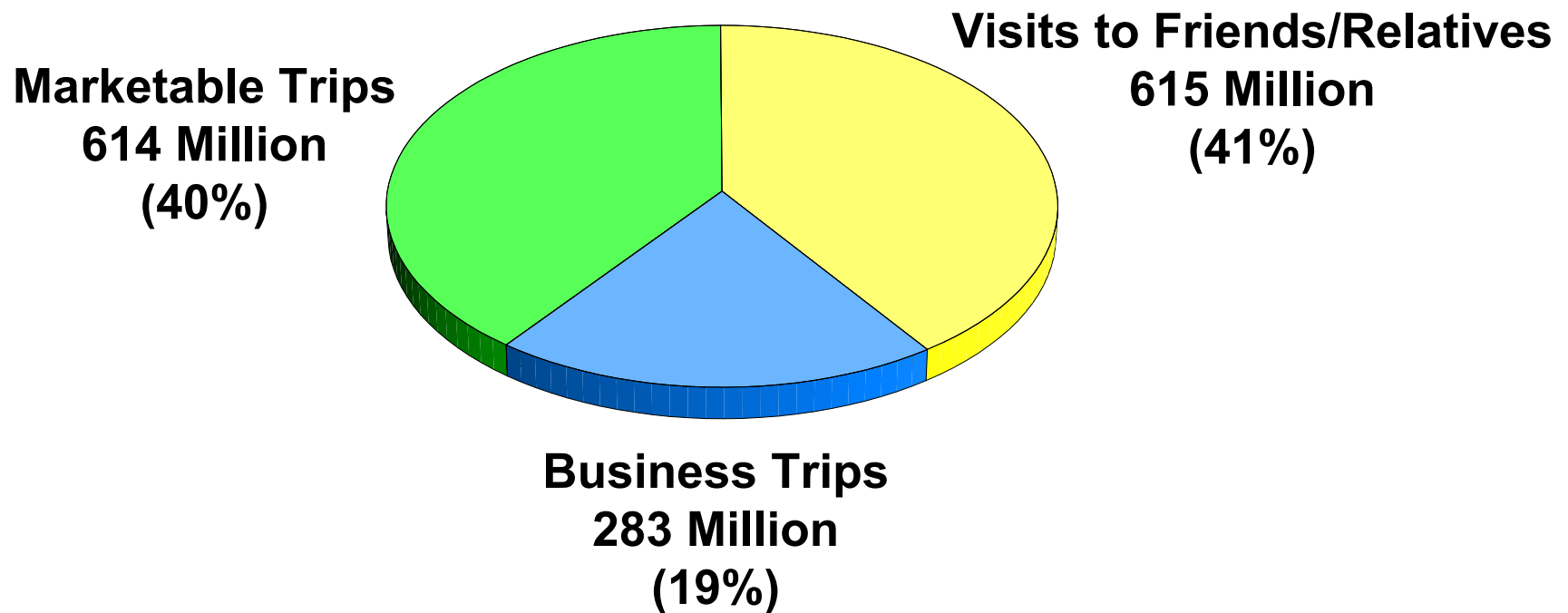
Overnight Trips



2002 Travel Year

Base: Overnight Trips

Total = 1.512 Billion

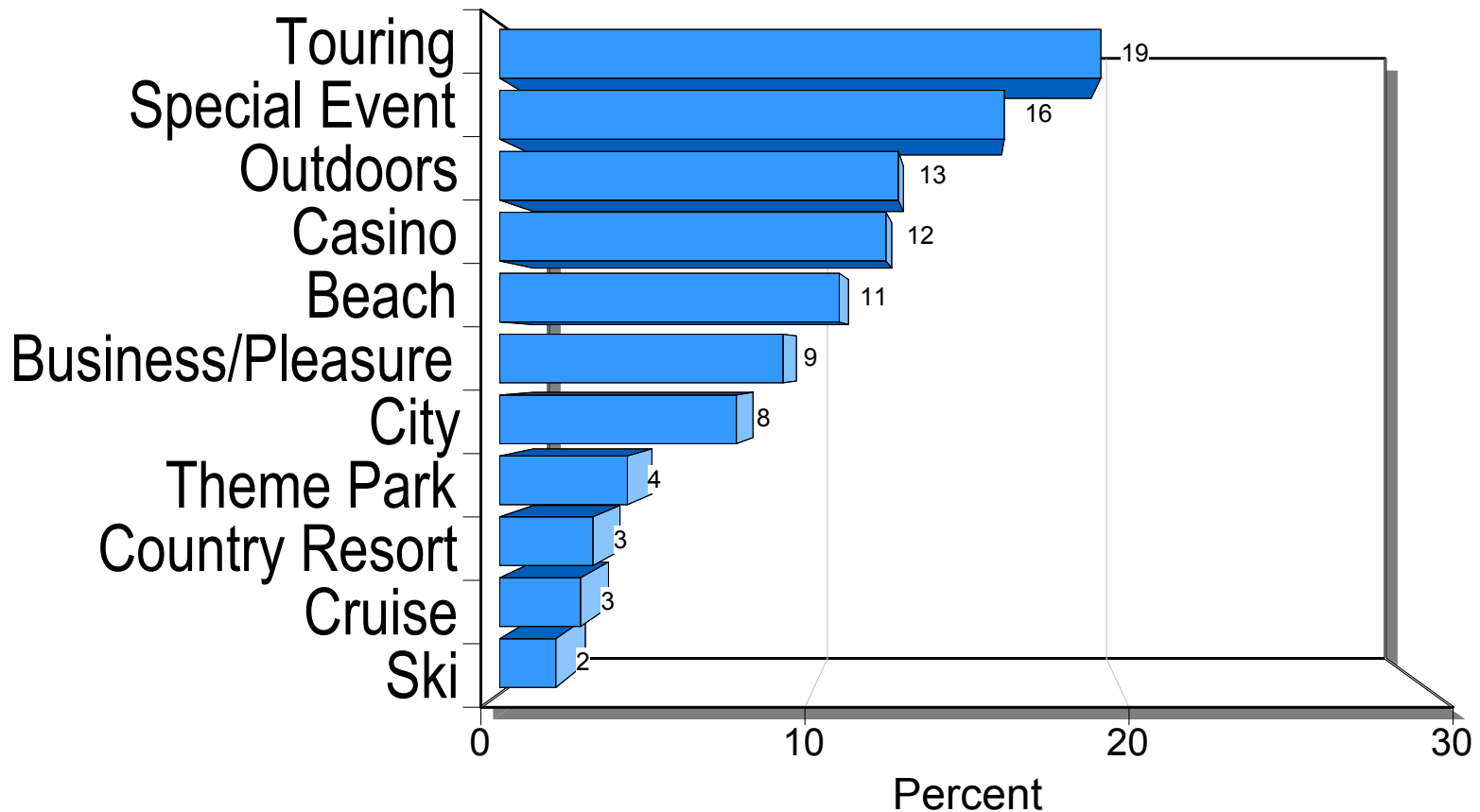


U.S. Overnight Marketable Trip Mix 2002 Travel Year



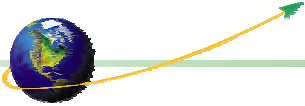
2002 Travel Year

Base: Overnight Marketable Trips



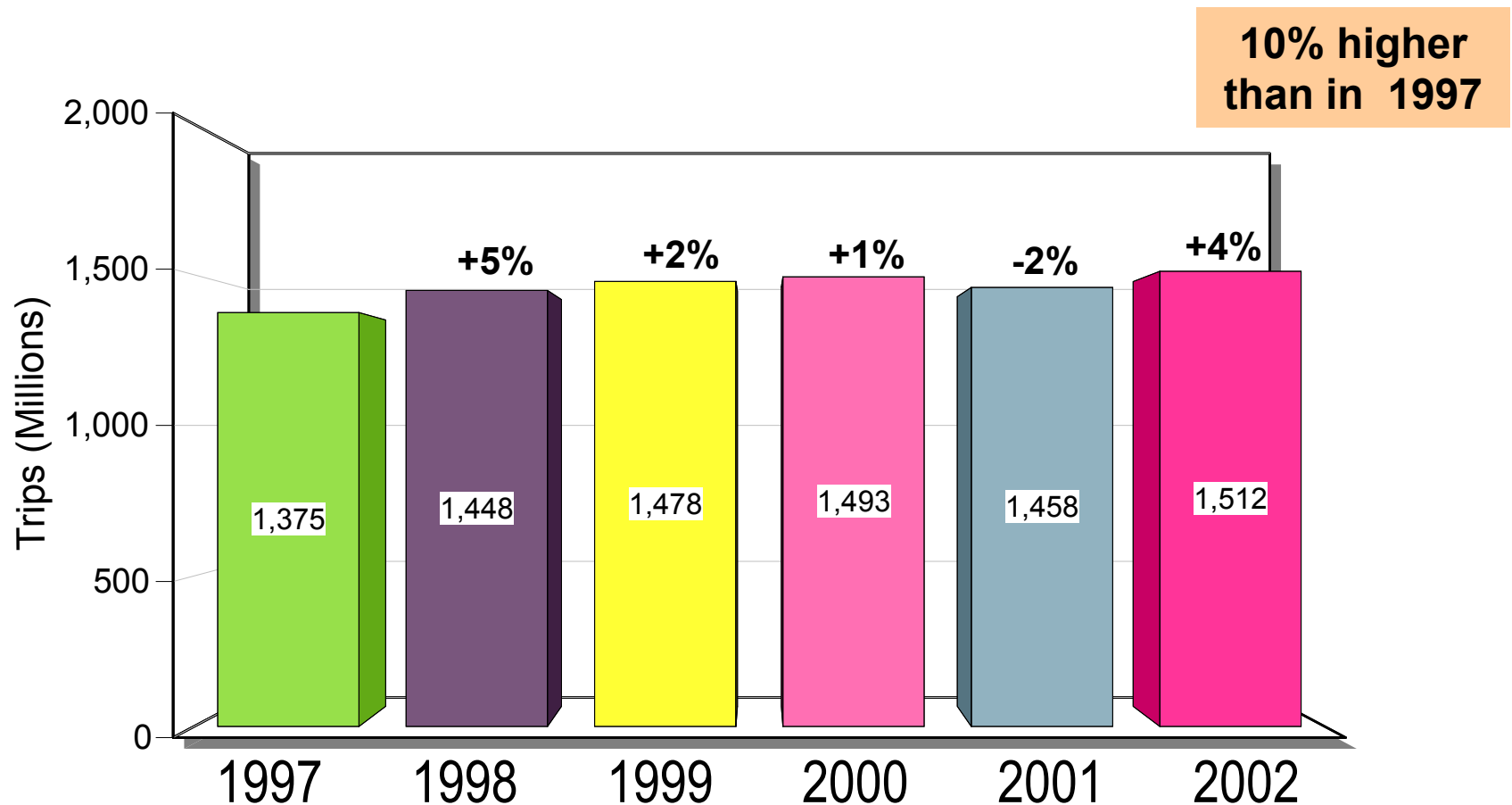
Size of the U.S. Travel Market

Overnight Trips

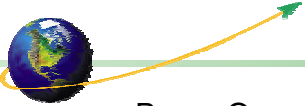


2002 Travel Year

Base: Overnight Trips

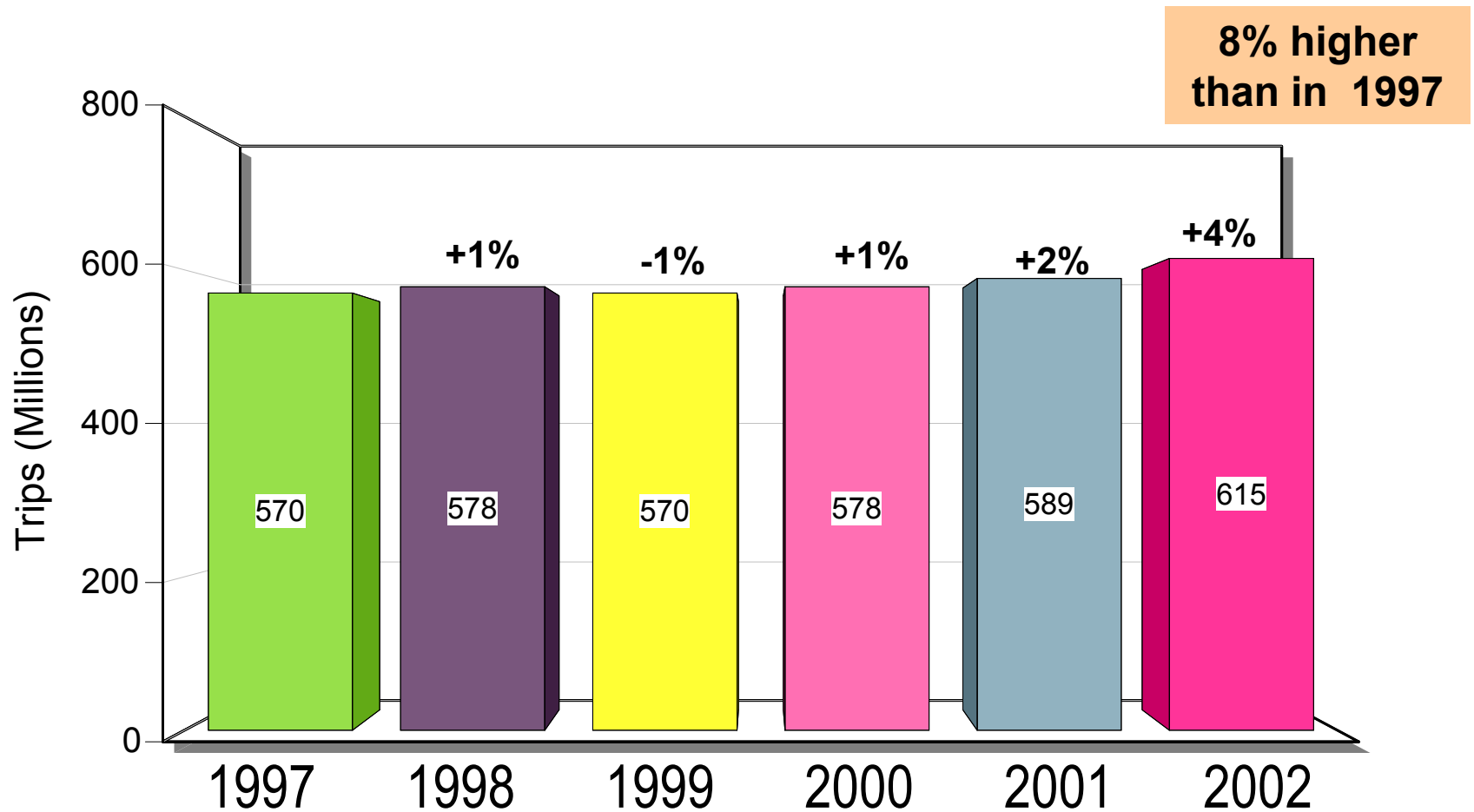


U.S. VFR Trips



2002 Travel Year

Base: Overnight VFR Trips

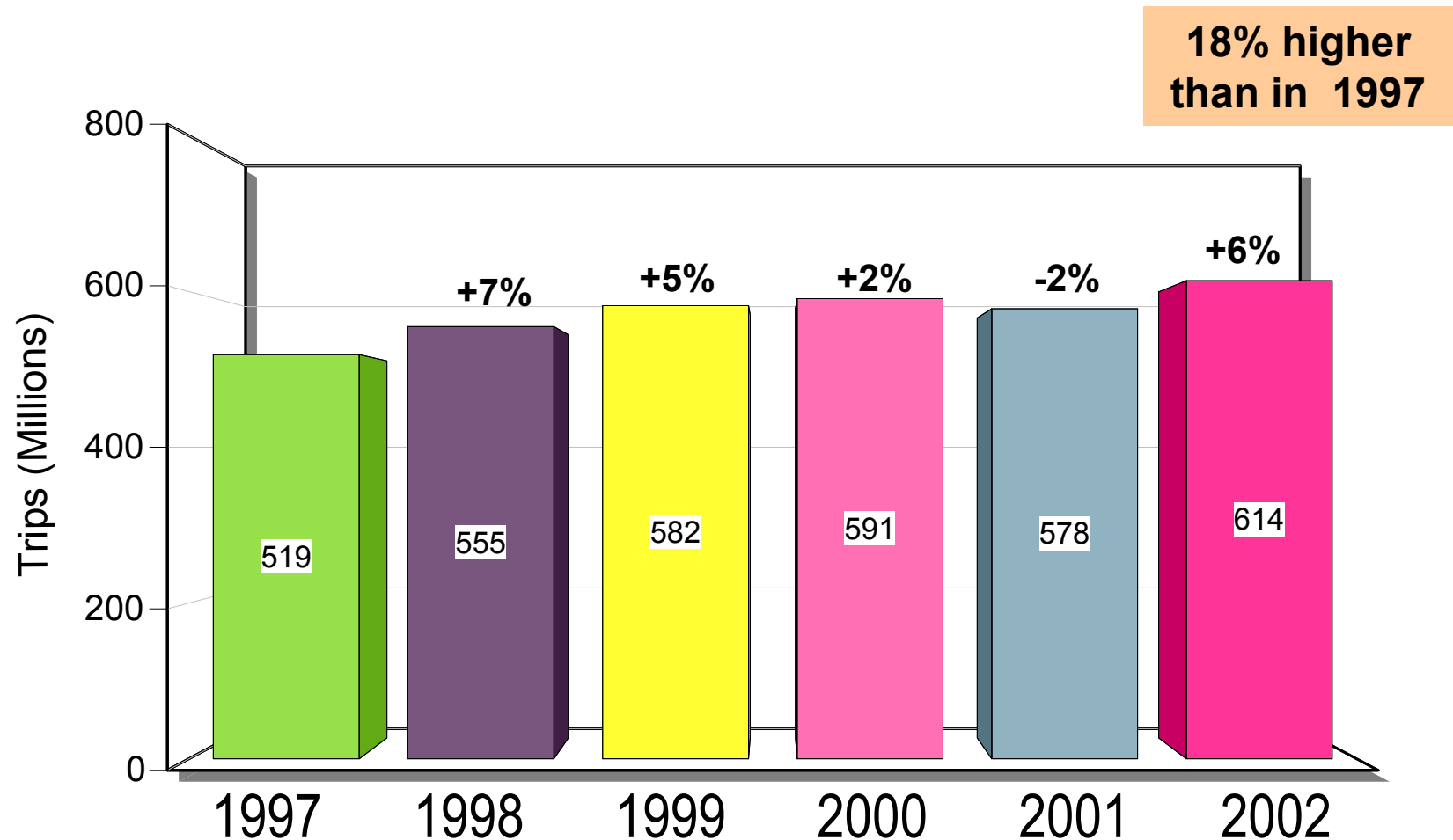


U.S. Marketable Trips



2002 Travel Year

Base: Overnight Marketable Trips



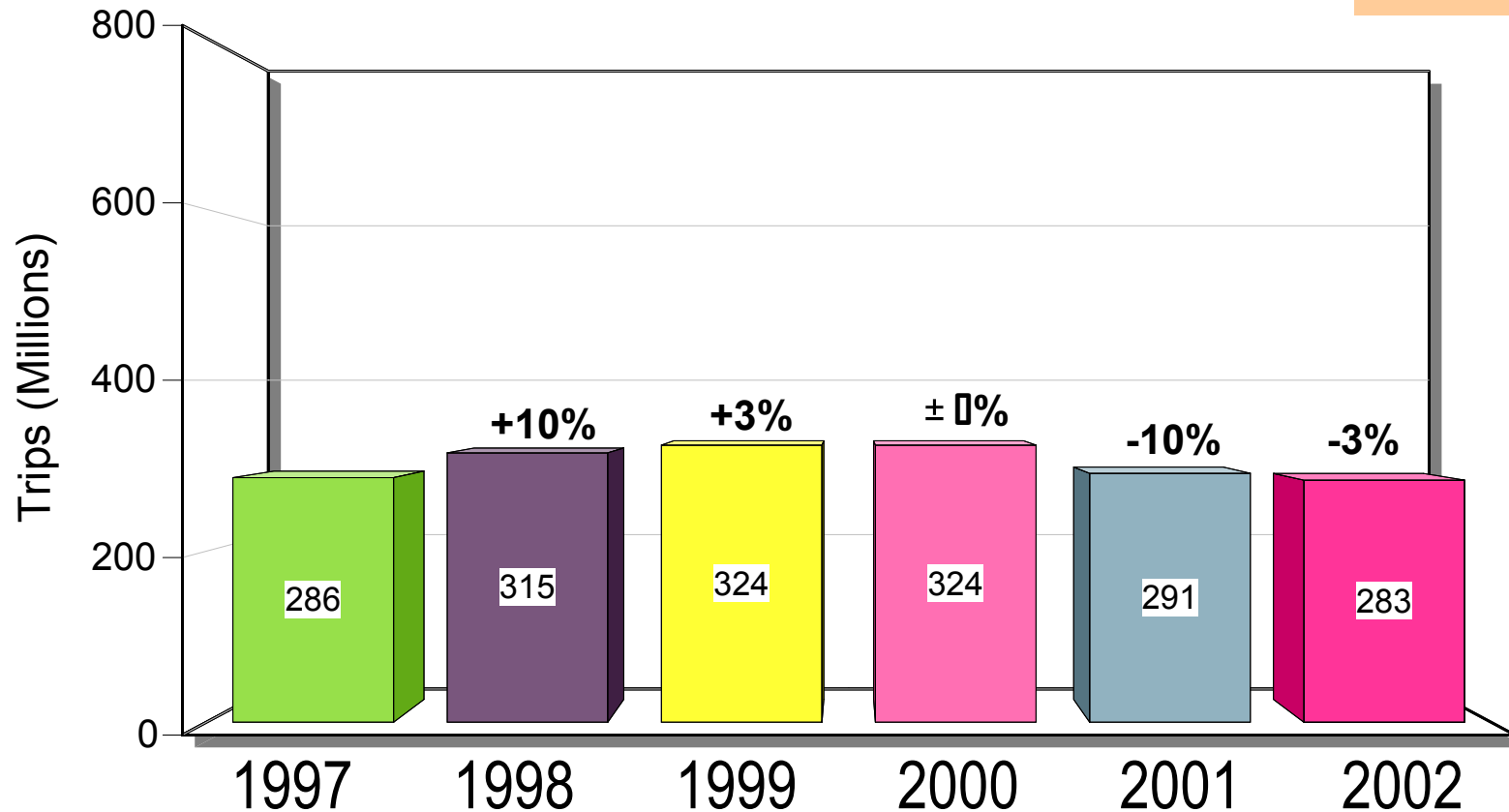
U.S. Business Trips



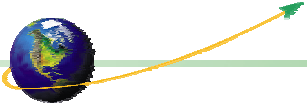
2002 Travel Year

Base: Overnight Business Trips

**1% lower
than in 1997**



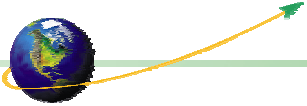
Performance of Maine's Travel Market



2002 Travel Year

- ⊙ Maine's combined Day and Overnight trip market reached an estimated 43.8 million trips in 2002.
- ⊙ *There were 34.7 million Day trips.*
 - ⊙ *58% or 20.0 million of which were Marketable and,*
 - ⊙ *Shopping was the number one trip-type by an almost 2 to 1 margin over the next two in line, they being Touring and Outdoor trips.*
 - ⊙ *33% were VFR and 9% were Business trips.*

Performance of Maine's Travel Market cont'd

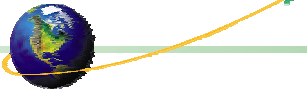


2002 Travel Year

- ⊙ *There were 9.1 million Overnight trips.*
 - ⊙ *48% or 4.3 million of which were Marketable with –*
 - ⊙ *the leading types, in rank order, being Touring, Outdoors, Beach and Special Event trips;*
 - ⊙ *43% were VFR and 9% were Business Trips.*

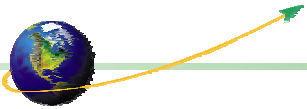
Performance of Maine's Travel Market cont'd

2002 Travel Year



- ⊙ Non-residents and the nearby region were important contributors to Maine's travel market; non-residents accounted for:
- ⊙ *More than half of Maine day trips -*
 - ⊙ *43% came from Boston and 10% from other areas within the day trip area, while residents accounted for the balance 47%.*
- ⊙ *More than three-quarters of Maine overnight trips -*
 - ⊙ *51% were taken by non-residents living in the nearby region and 27% by non-residents living beyond; while residents accounted for the balance 22%.*

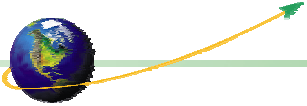
Maine Travel Trends



2002 Travel Year

- ◉ Maine's overall travel market grew by 2% in 2002.
 - ◉ *Day trips grew by 2%, after a 2% decline in 2001.*
 - ◉ *Overnight trips grew by 1%, building on 2% growth in 2001, and recovering from the 6% decline of 2000.*
 - ◉ *This growth lagged, however, the key performance comparison benchmarks of 5% regional and 4% national growth in 2002.*
 - ◉ *Of particular note, Marketable trips grew by 1% versus 5% regional and 6% national growth and,*
 - ◉ *resulted in a regional Marketable trip share decline from 3.8% in 2001 to 3.5% in 2002.*

Key Driving Factors



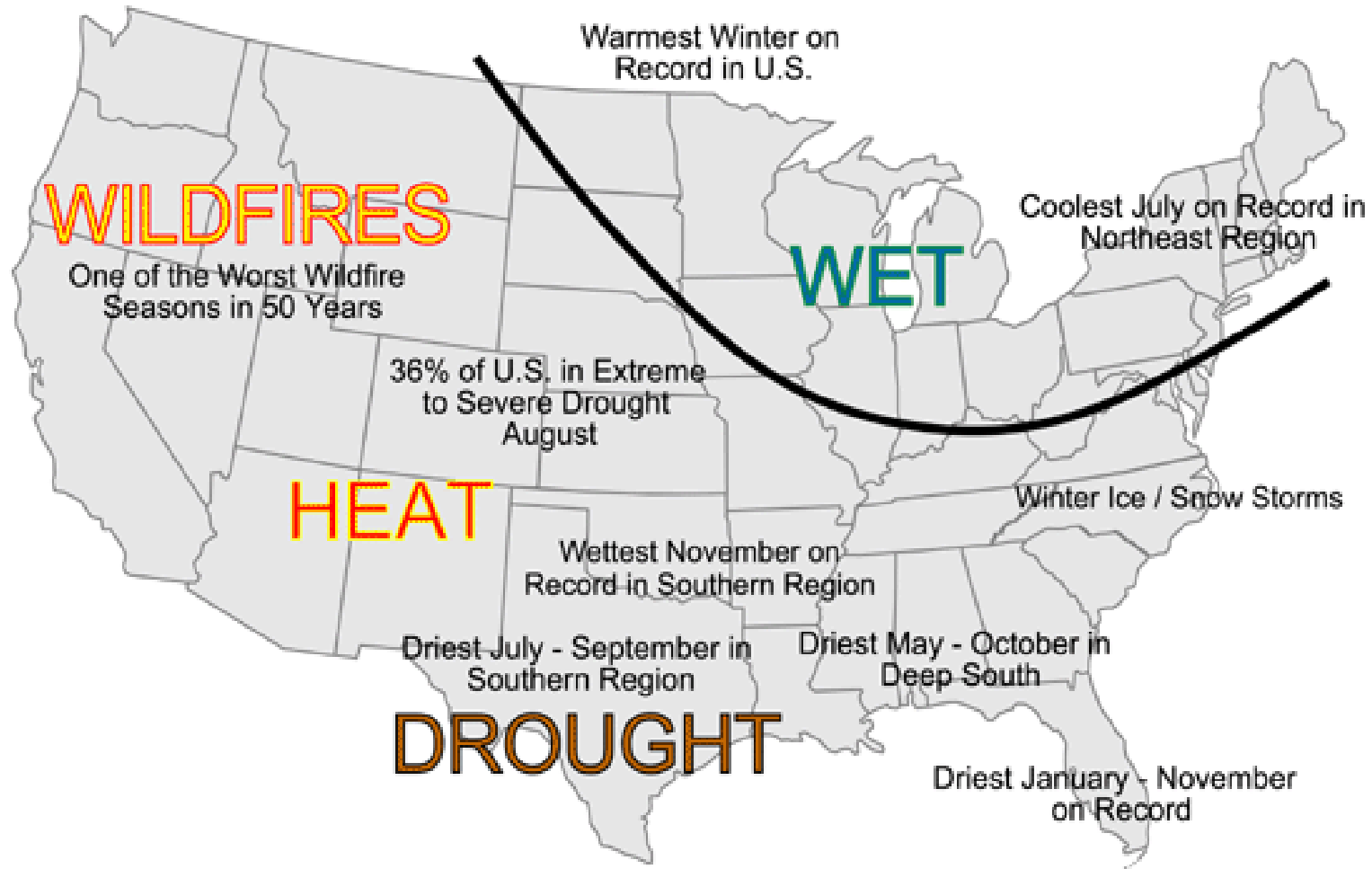
2002 Travel Year

- ⊙ A look back provides perspective for understanding Maine's overnight market performance - in the context of:
 - ⊙ *particularly poor weather in Maine during Summer 2000,*
 - ⊙ *the soft overall economy in 2001, exacerbated by -*
 - ⊙ *the impact of the September 11th tragedy.*

Significant U.S. Weather and Climate Events for 2000

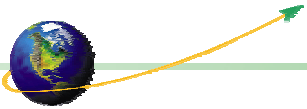


2002 Travel Year

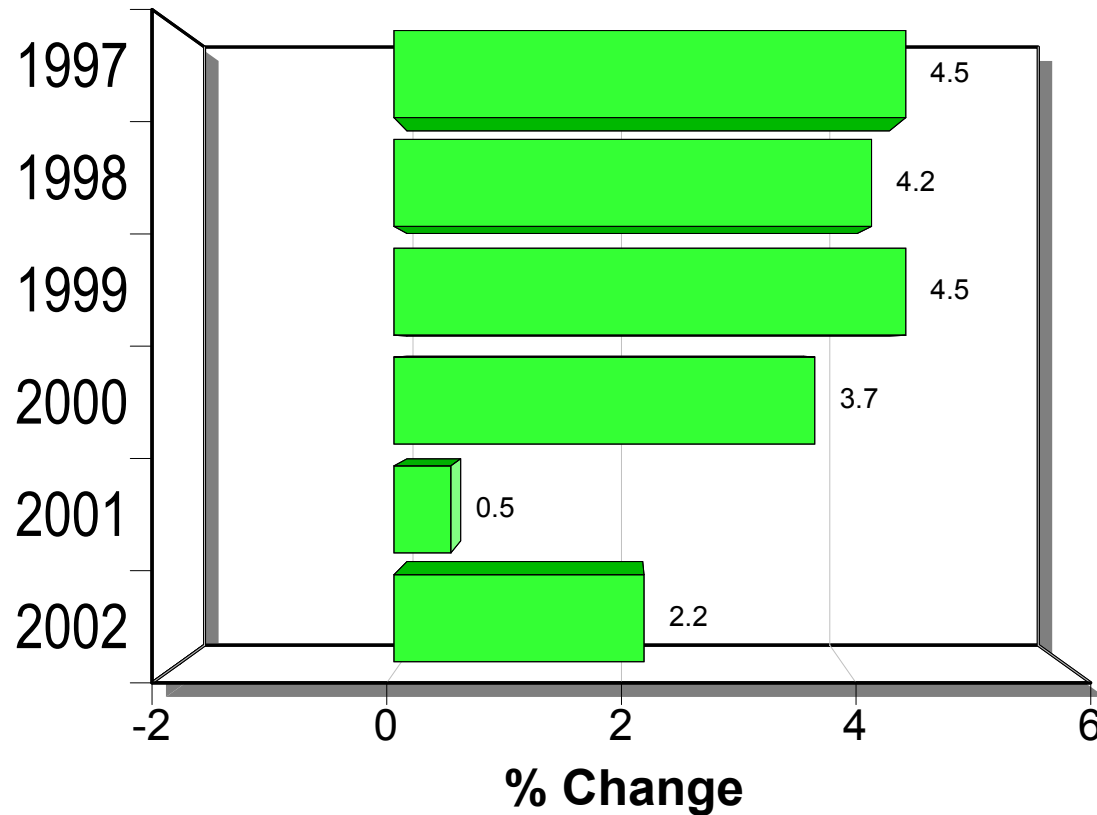


Real GDP Growth in U.S.A.

(Gross Domestic Product)

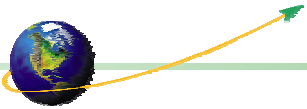


2002 Travel Year

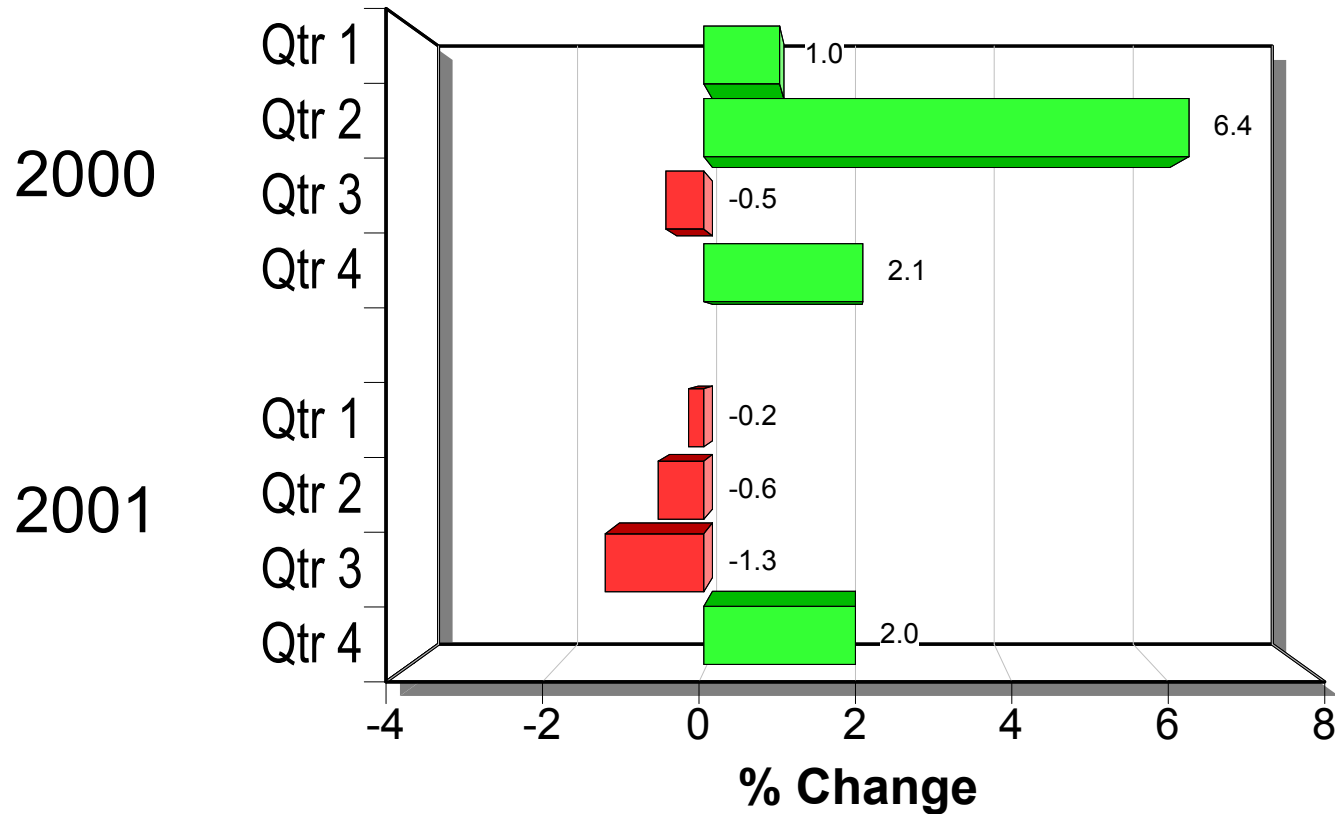


Real GDP Growth in U.S.A.

(Gross Domestic Product)

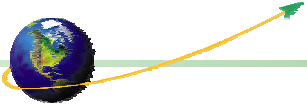


2002 Travel Year



By Key Segments

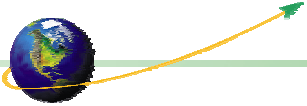
2002 Travel Year



- ⊙ **VFR** suffered an 11% decline in the poor weather year but recovered in 2001 and held their own into 2002.
 - ⊙ *Industry opinion credited a national VFR recovery to September 11th and resulting inclinations to keep closer to home (and in the U.S.A) and to visit loved ones.*
 - ⊙ *Volume has grown over the medium-term as well and was 13% higher in 2002 than in 1997.*
- ⊙ **Marketable** trips have been the most consistent performer for Maine.
 - ⊙ *Volume held its own (within $\pm 1\%$) through the poor weather, the soft economy, September 11th and into 2002.*
 - ⊙ *Volume in 2002 was still 19% higher than in 1997.*

Maine Travel Trends

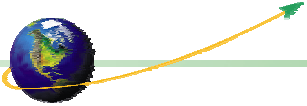
By Key Segments cont'd



2002 Travel Year

- ⊙ **Business** trips, on the other hand, have consistently depressed Maine's overall performance.
 - ⊙ *Their volume decline began in 1999 and continued through 2000 and 2001 and,*
 - ⊙ *despite returning to a positive trend in 2002, the number of trips is 17% lower than in 1997.*

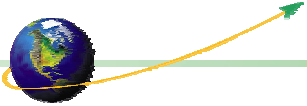
Relative to the Nation & Region



2002 Travel Year

- ◉ In 2000, Maine underperformed both the regional and national travel markets; its regional share declined from 3.8% to 3.5%.
 - ◉ *Maine's weather was purportedly even worse than the rest of the North-east.*
- ◉ In 2001, share recovered to 3.8% -
 - ◉ *owing to especially weak regional and national performance.*
- ◉ In 2002, Maine's volume held but share was back down to 3.5% -
 - ◉ *owing to strong regional and national recovery from the extraordinary events of 2001.*

Maine Travel Trends *cont'd*



2002 Travel Year

◉ NET/NET

- ◉ *Both Maine and the region have kept pace or bettered the National market over the past five years -*
 - ◉ *10% more Maine trips in 2002 than 1997*
 - ◉ *14% more regional trips*
 - ◉ *10% more National trips*
- ◉ *Further, Maine has been the more consistent volume performer during the more recent years with-*
 - ◉ *its share gains and losses reflecting instead volatility in the regional and national markets.*

Size of Maine's U.S. Travel Market

2002 Travel Year

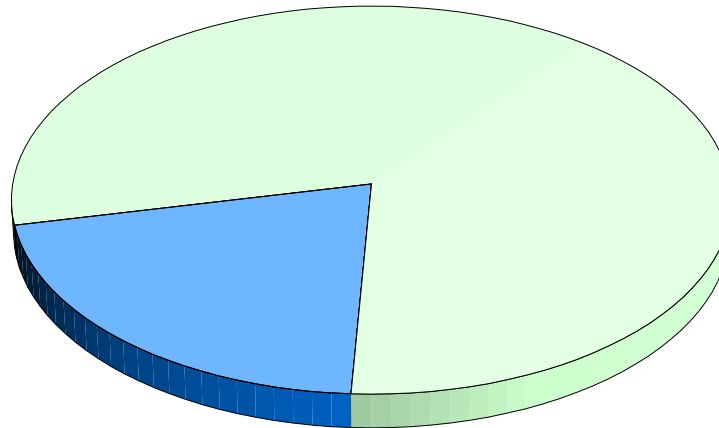


2002 Travel Year

Base: Total Overnight and Day Trips

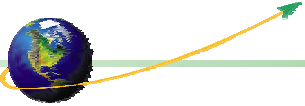
Total = 43.8 Million

Overnight Trips
9.1 Million
(21%)



Day Trips
34.7 Million
(79%)

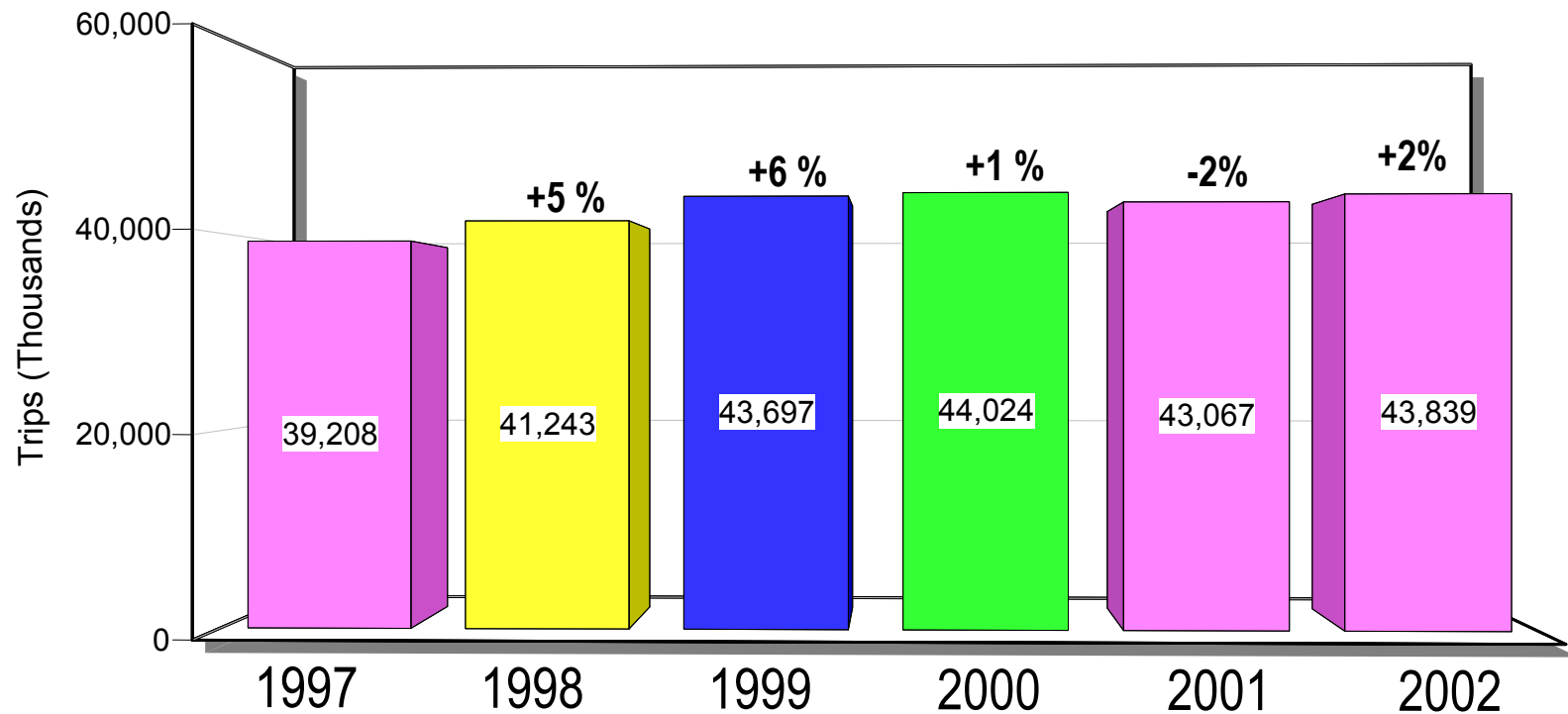
Maine's U.S. Travel Market



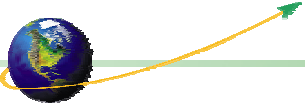
2002 Travel Year

Base: Total Overnight and Day Trips

**12% higher
than in 1997**

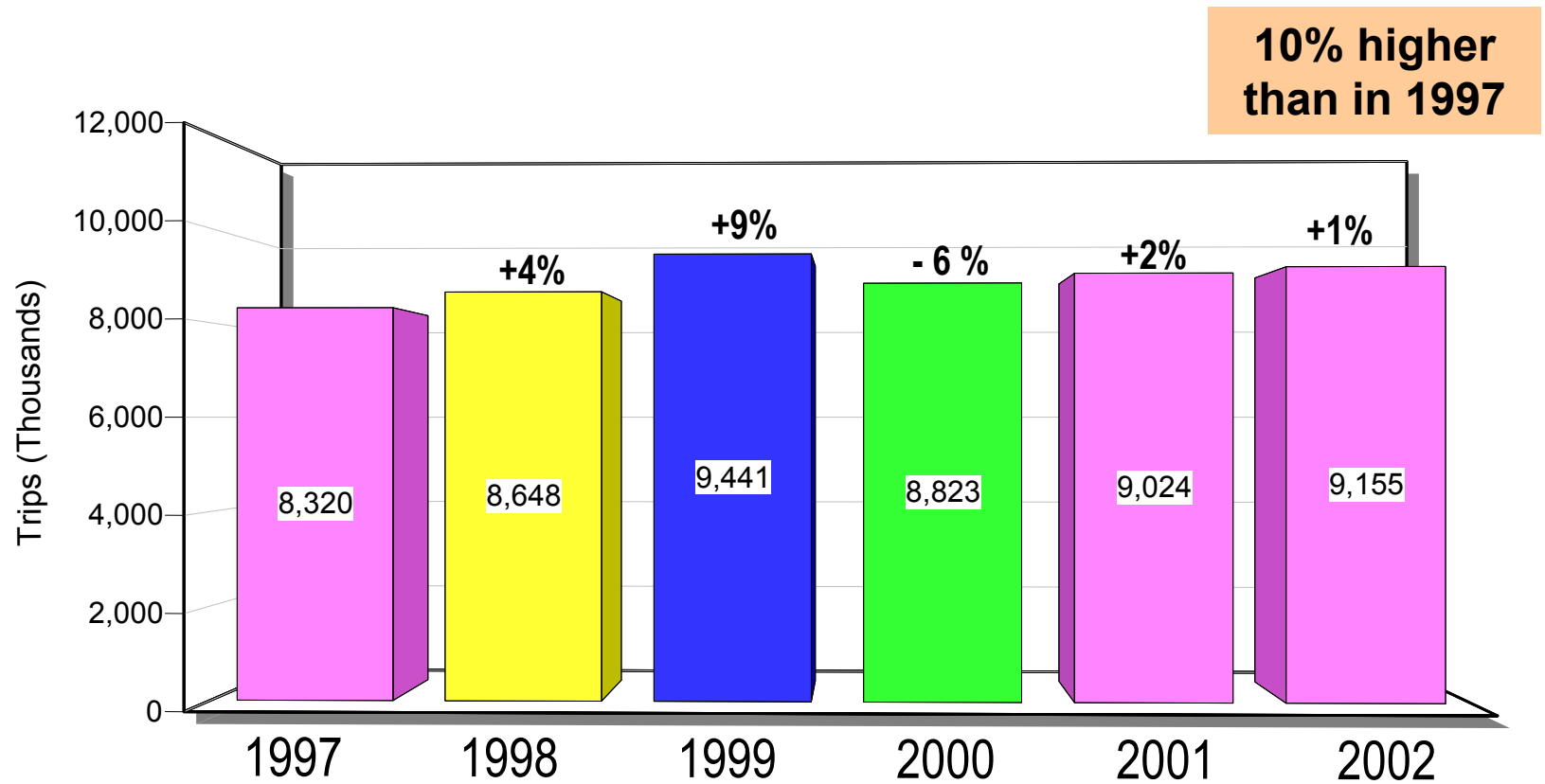


Maine Overnight Trips



2002 Travel Year

Base: Overnight Trips



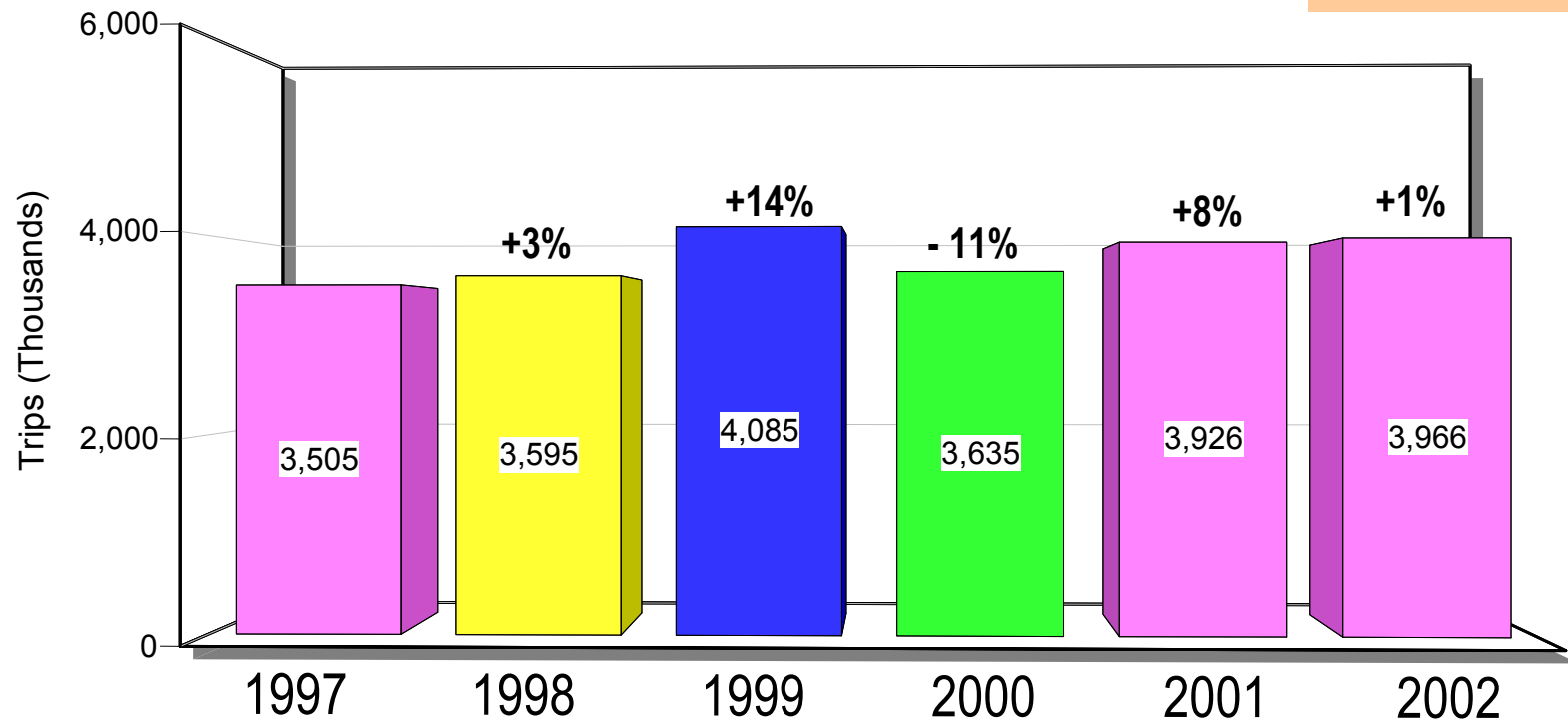
Maine Overnight VFR Trips



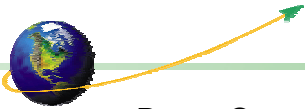
2002 Travel Year

Base: Overnight VFR Trips

**13% higher
than in 1997**



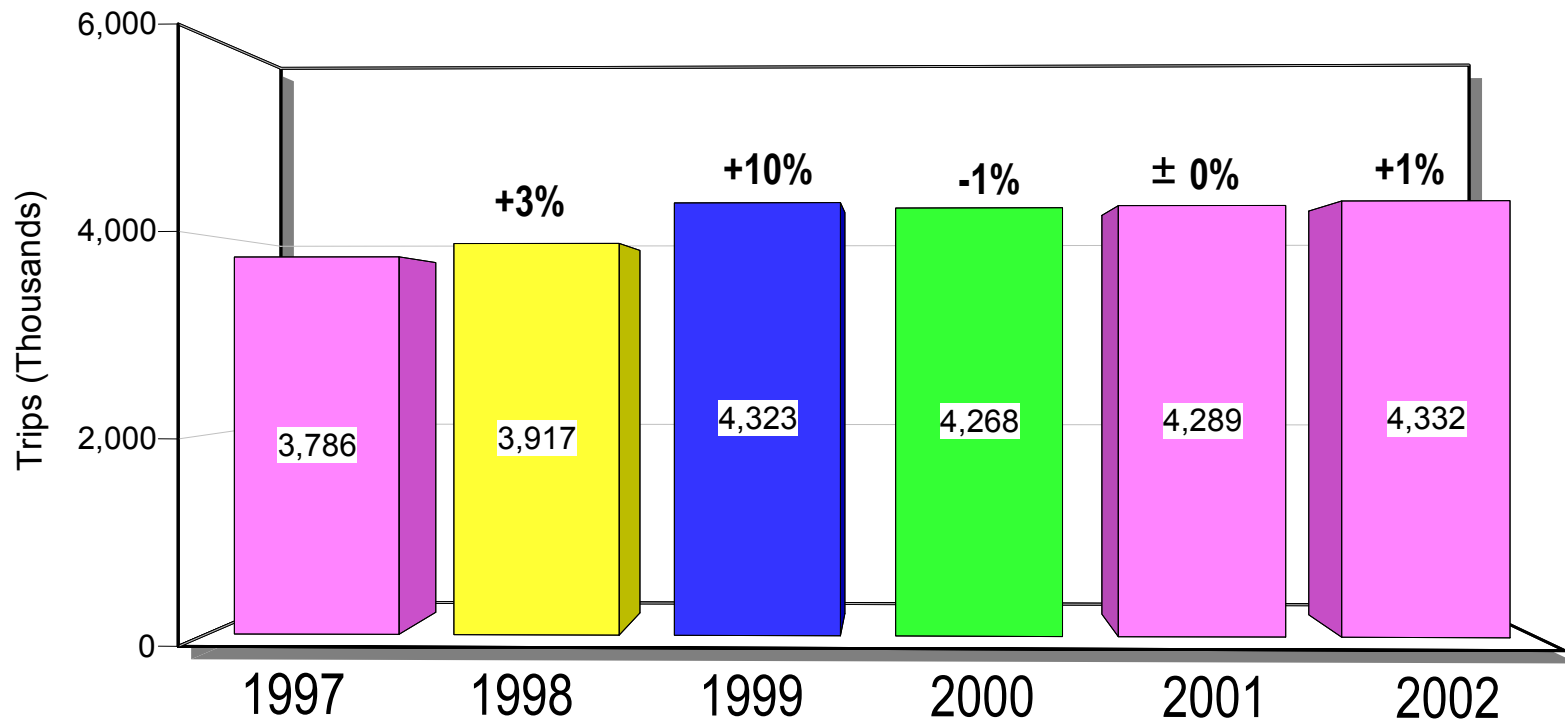
Maine Overnight Marketable Trips



2002 Travel Year

Base: Overnight Marketable Trips

**19% higher
than in 1997**

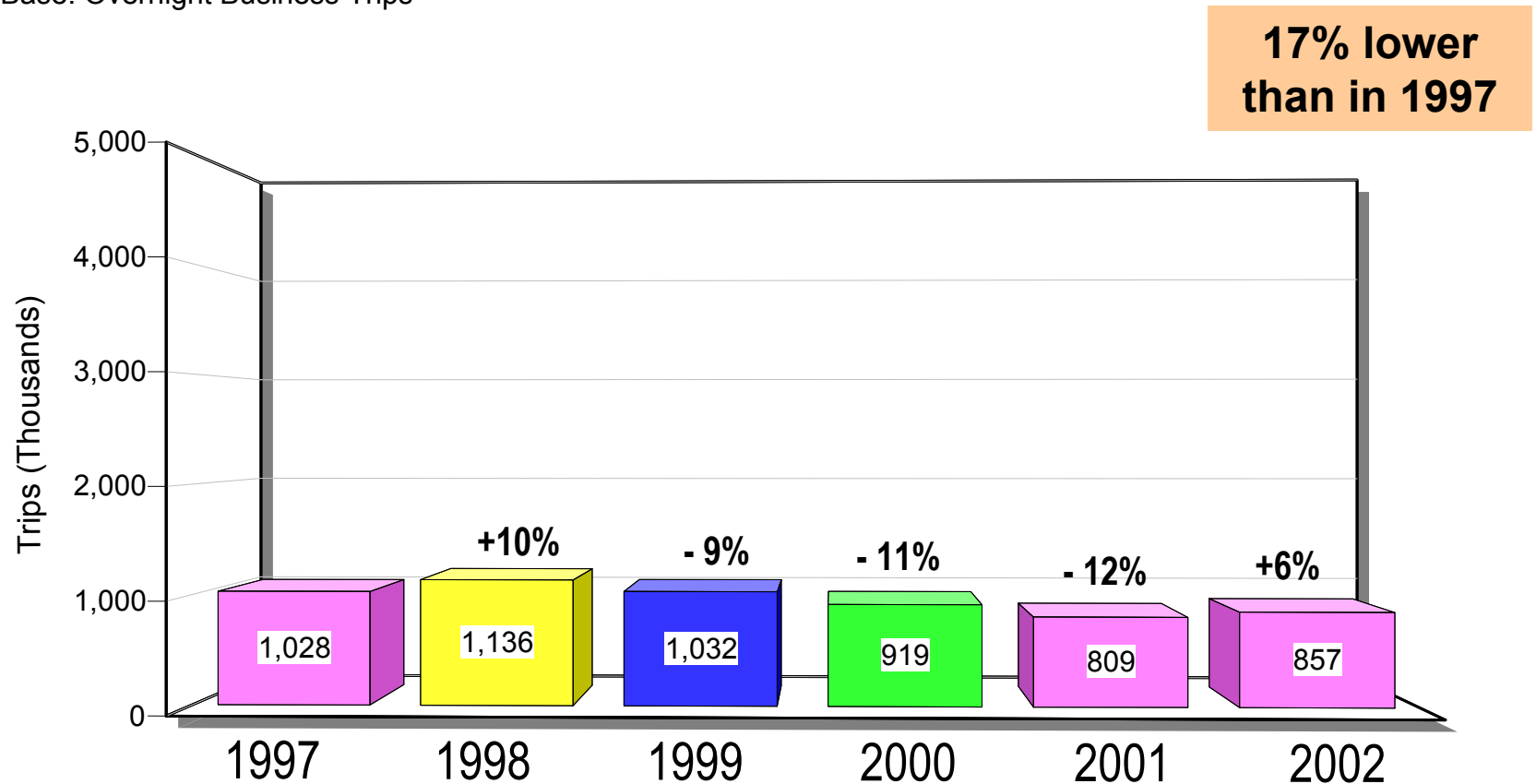


Maine Overnight Business Trips



2002 Travel Year

Base: Overnight Business Trips

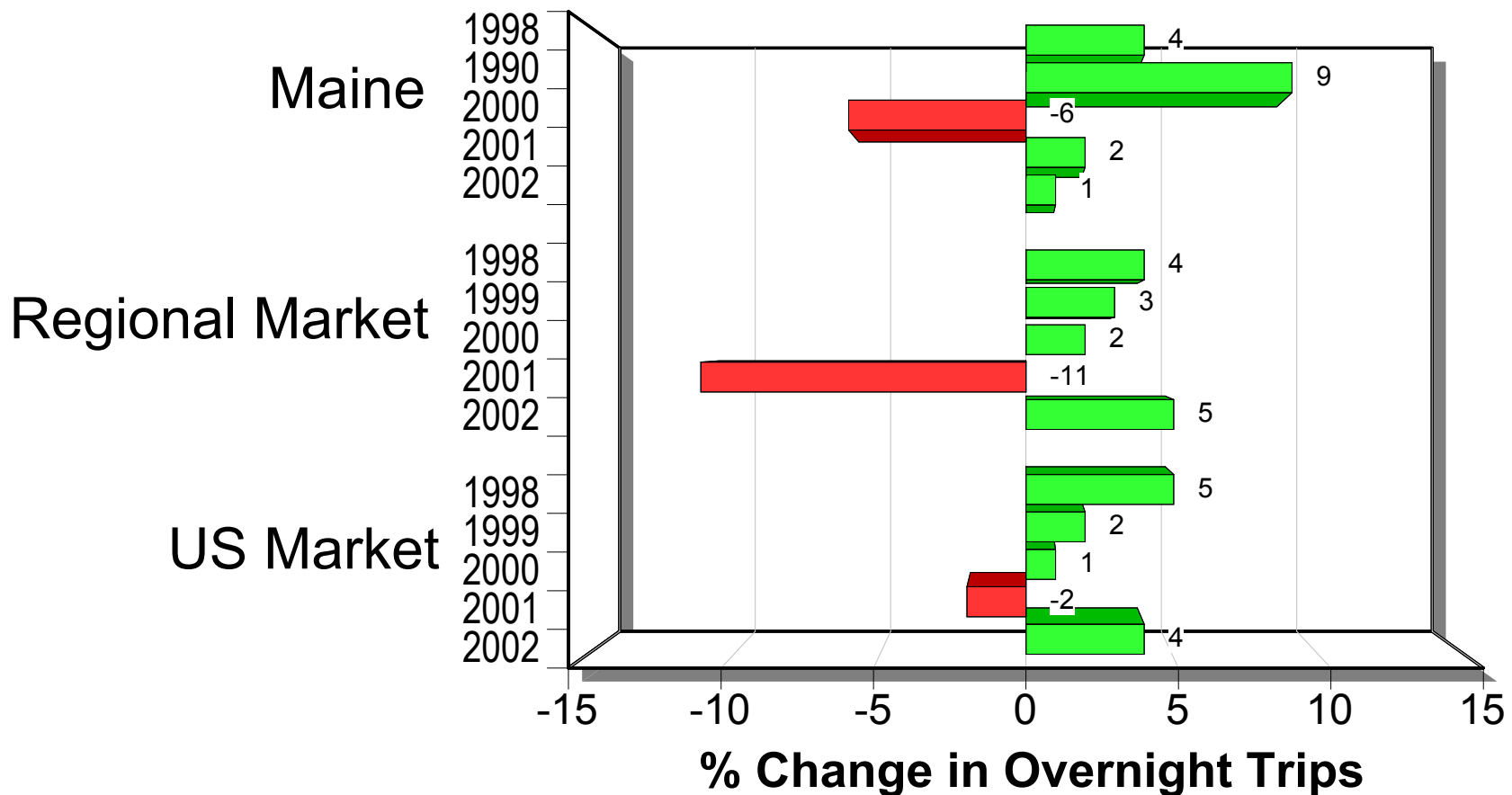


Maine's Performance versus the Regional & U.S. Markets



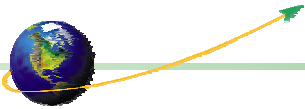
2002 Travel Year

Base: Overnight Trips



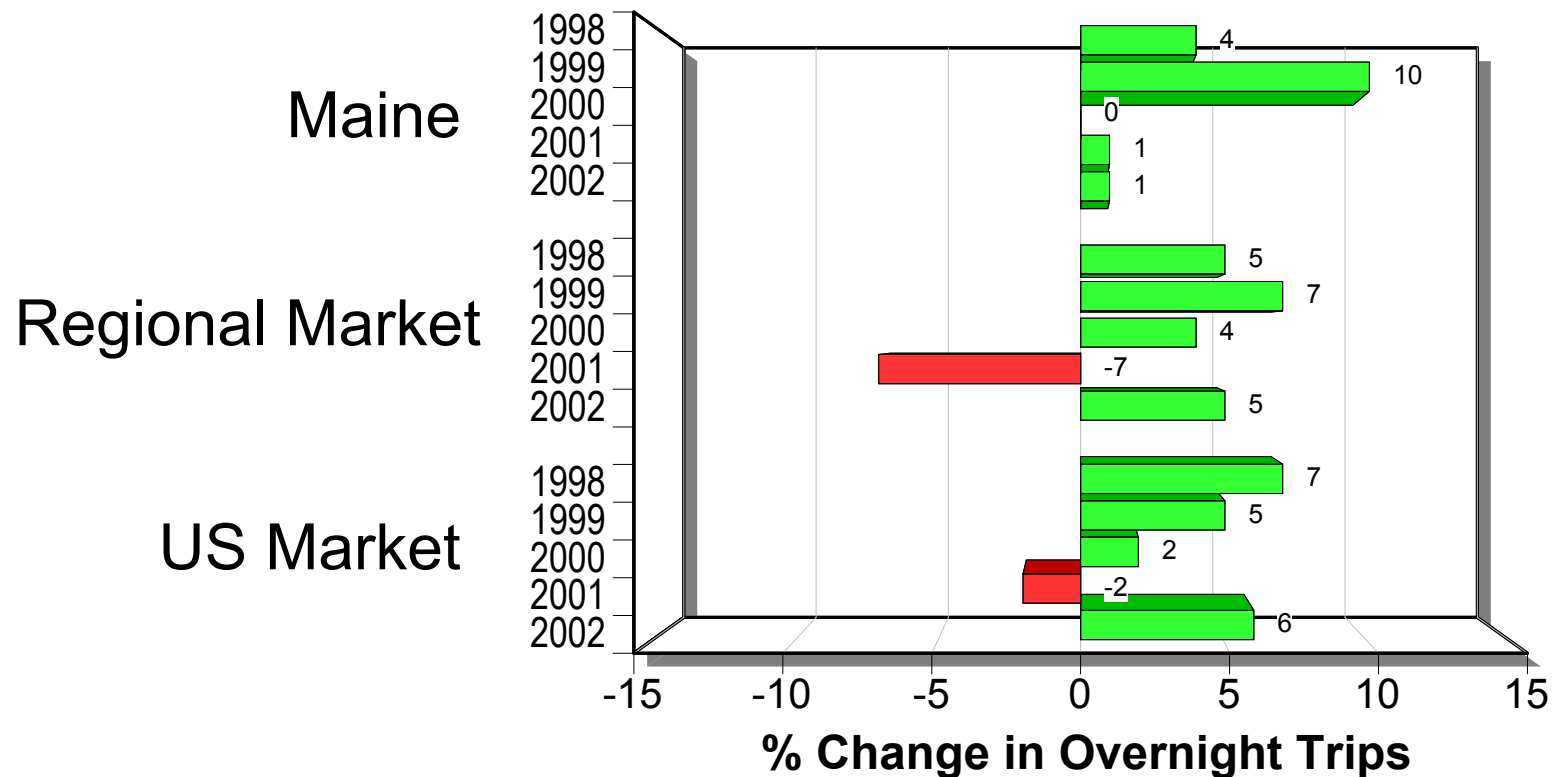
Note: Regional Market = Trips taken to all destinations by residents of New England, DC, DE, MD, NJ, NY, and PA

Maine's Performance versus the Regional & U.S. Markets – Marketable Trips



2002 Travel Year

Base: Overnight Marketable Trips



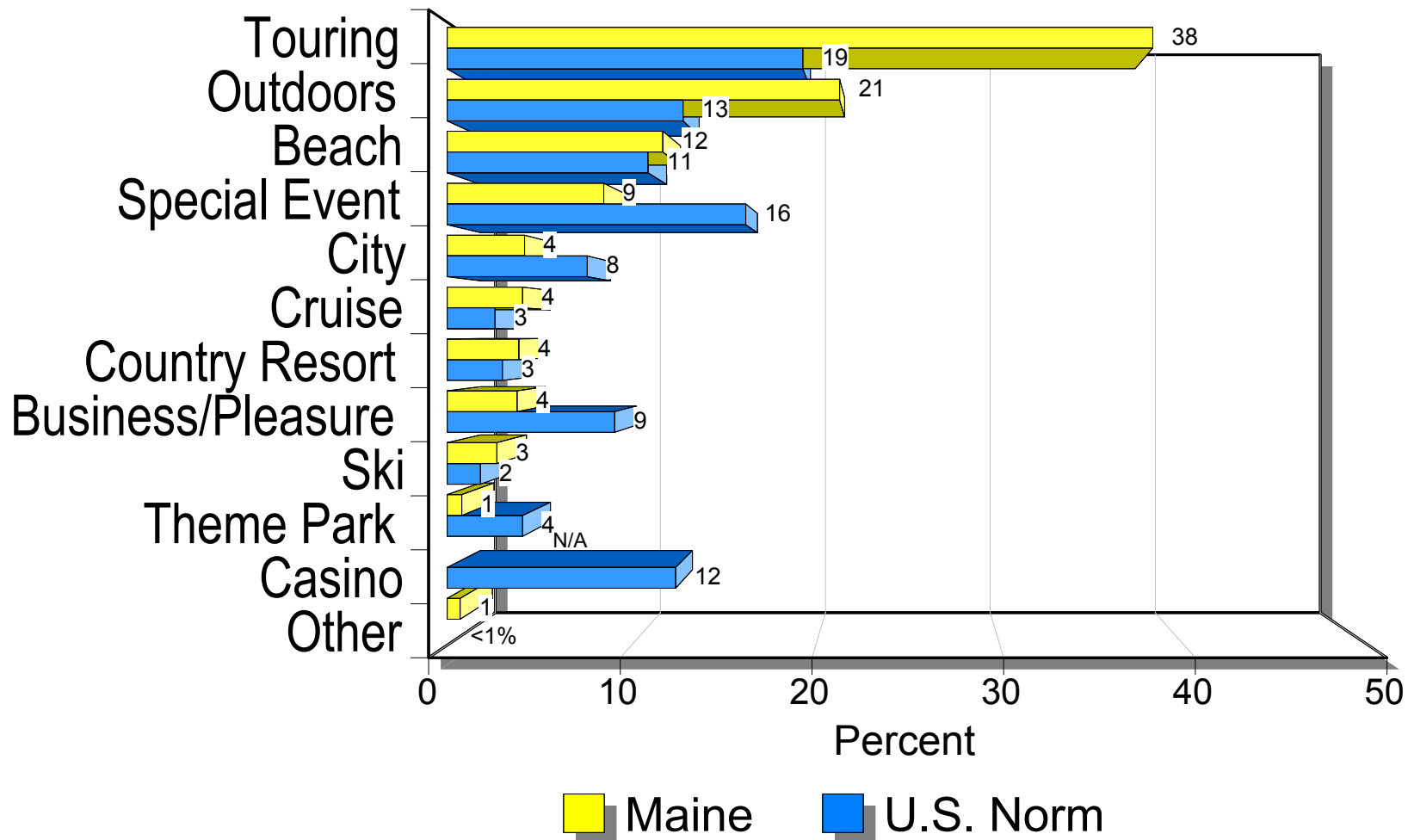
Note: Regional Market = Trips taken to all destinations by residents of New England, DC, DE, MD, NJ, NY, and PA

Marketable Trip Mix

Overnight Trips

2002 Travel Year

Base: Overnight Marketable Trips



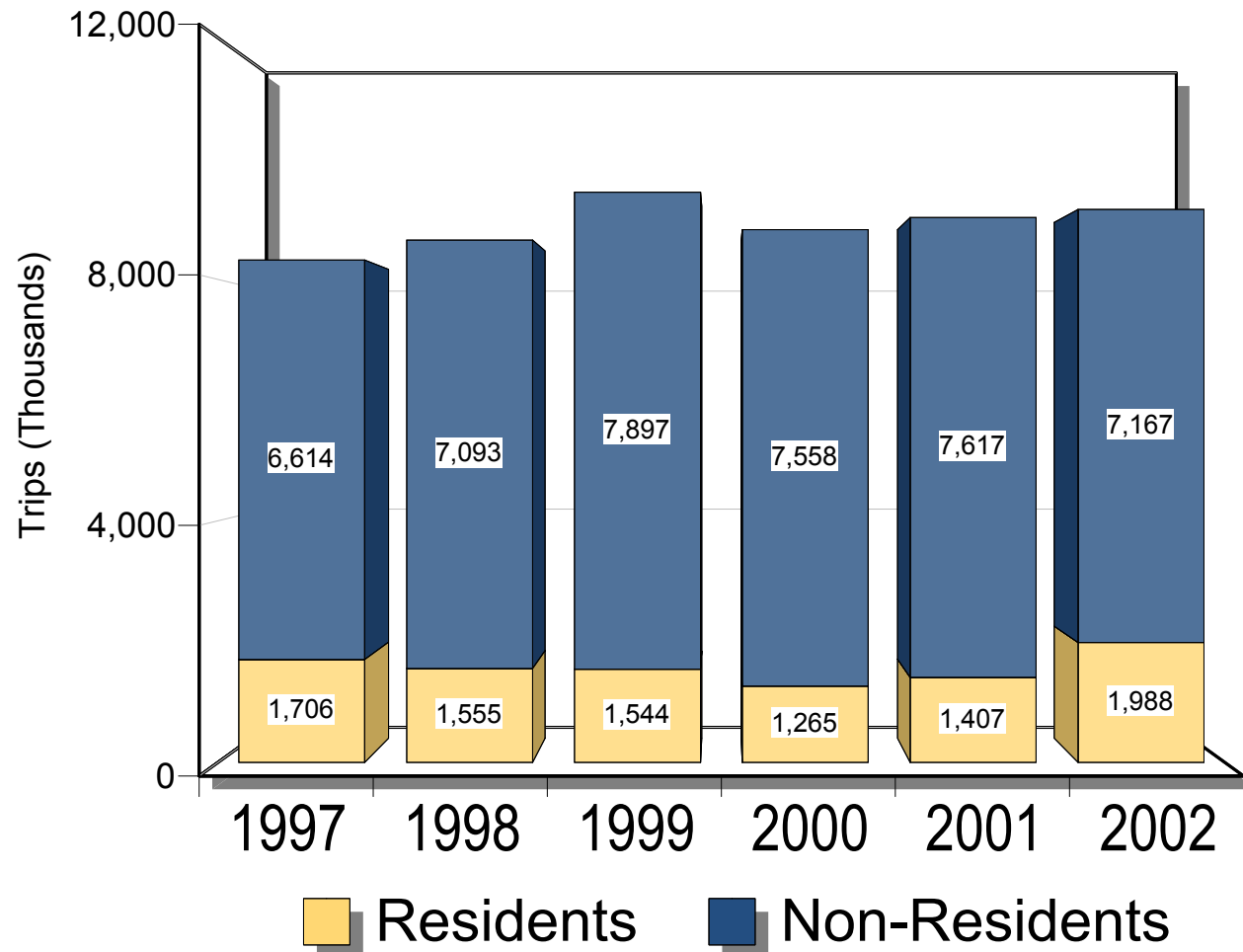
Role of Maine and Regional Residents

Role of Maine Residents on Maine Overnight Trips

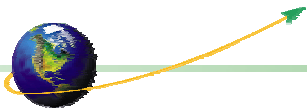


2002 Travel Year

Base: Overnight Trips

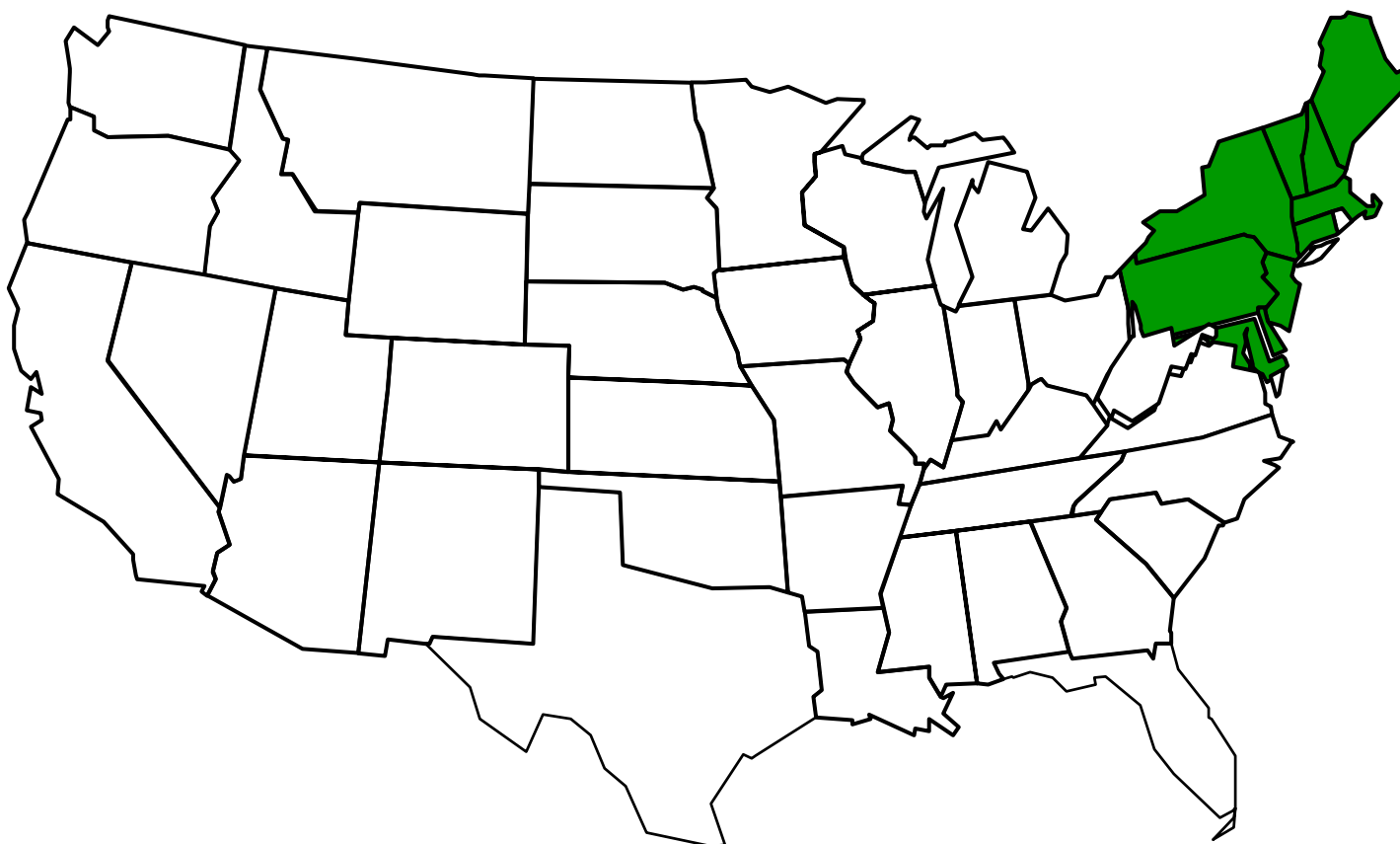


Maine's Regional Market



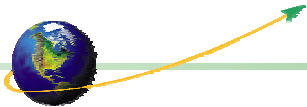
2002 Travel Year

Includes New England, DC, DE, MD, NJ, NY, and PA



Role of Maine's Regional Market

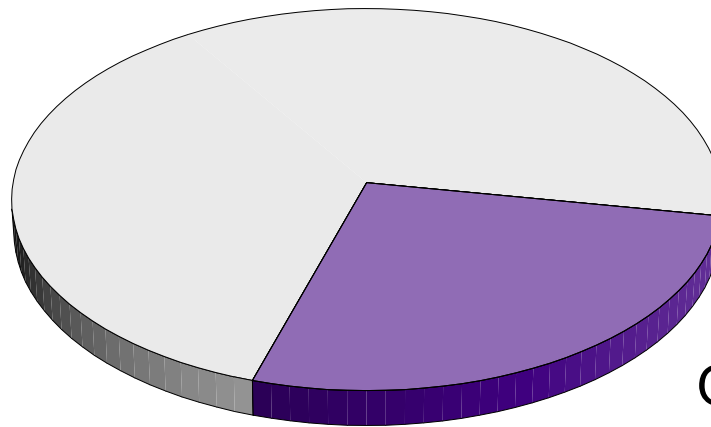
Maine Overnight Trips



2002 Travel Year

Total: 9.1 Million

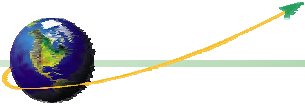
Regional Market*
6.7 Million
(73 %)



Other U.S. Markets
2.4 Million
(27%)

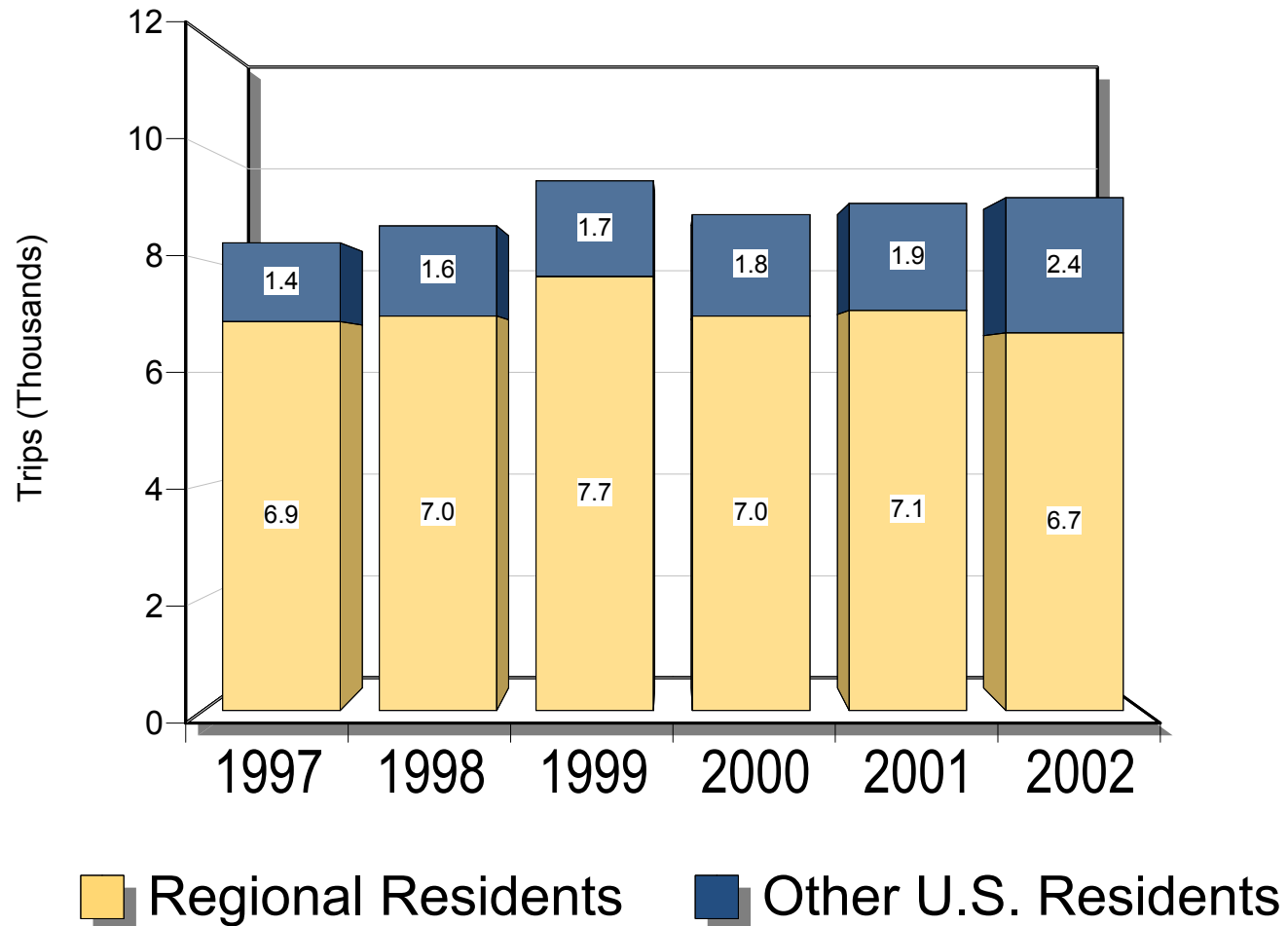
* Trips taken to Maine by regional residents (residents of New England DC, DE, MD, NJ, NY, and PA)

Role of Regional Residents on Maine Overnight Trips



2002 Travel Year

Base: Overnight Trips



* Trips taken to Maine by regional residents (residents of New England DC, DE, MD, NJ, NY, and PA)

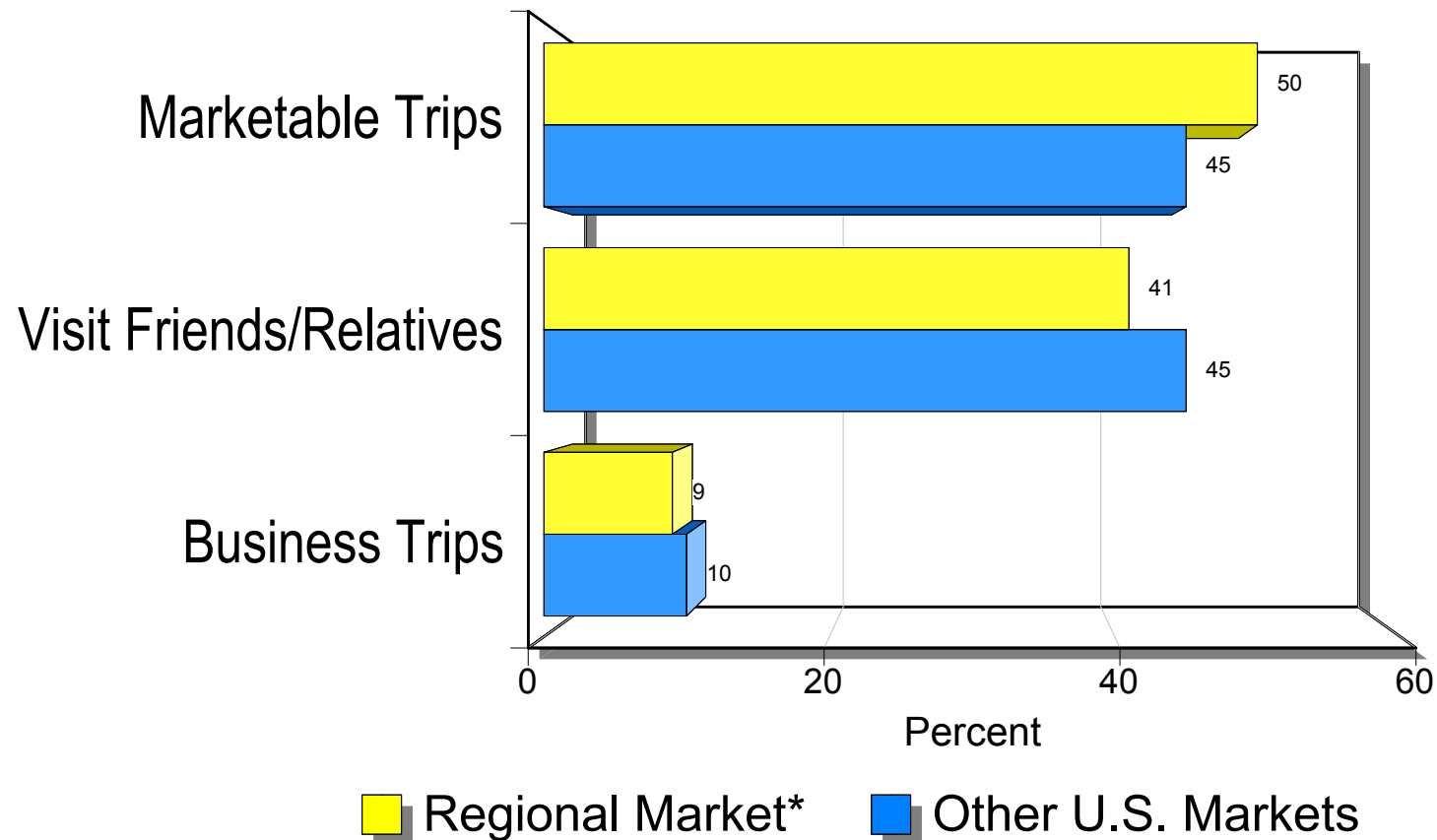
Maine's Overnight Trip Segments

Regional vs. Other U.S. Markets



2002 Travel Year

Base: Overnight Trips



* Trips taken to Maine by regional residents (residents of New England DC, DE, MD, NJ, NY, and PA)

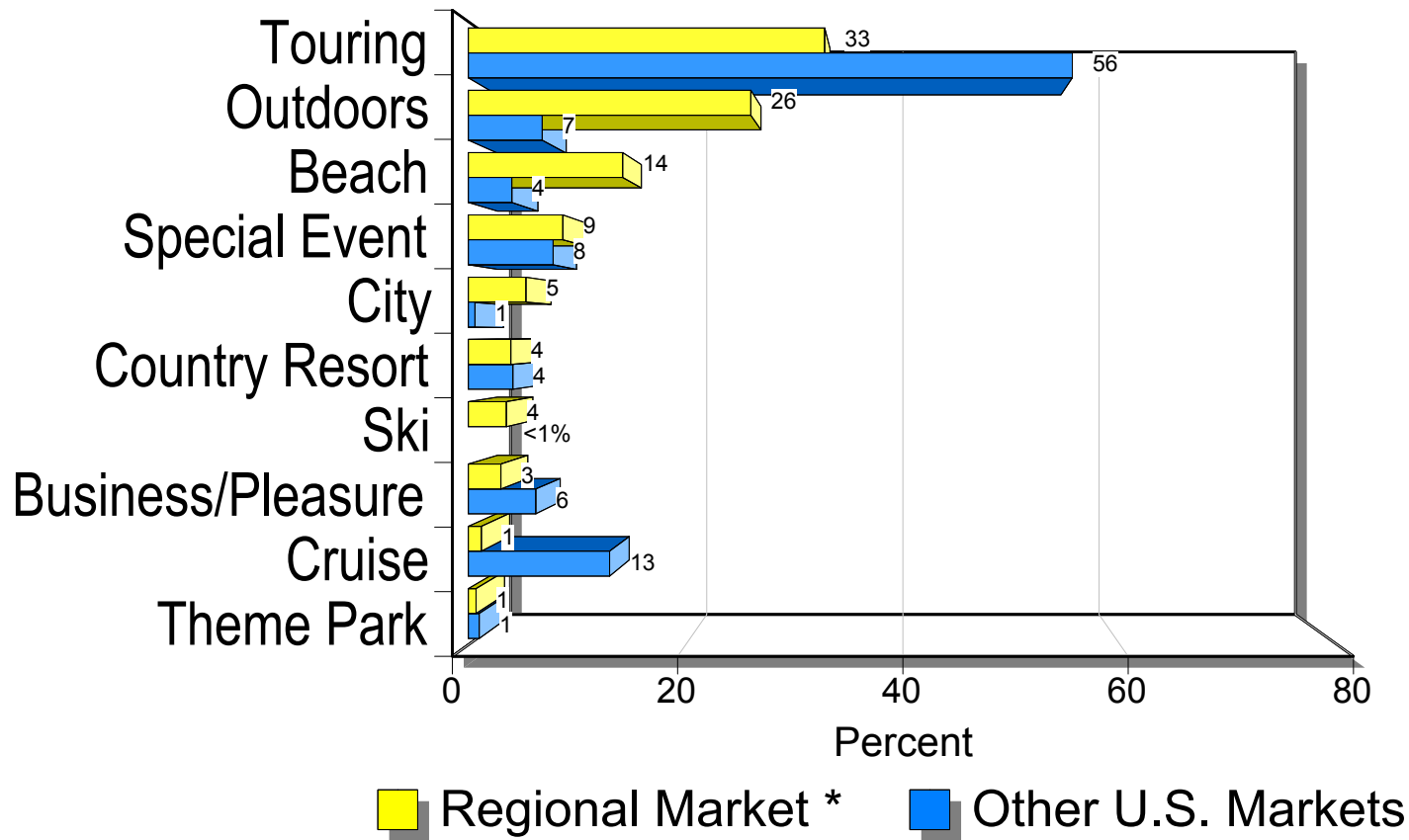
Maine Marketable Trip Mix

Overnight Trips by Market



2002 Travel Year

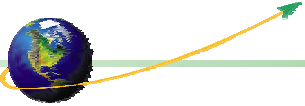
Base: Overnight Marketable Trips



* Trips taken to Maine by regional residents (residents of New England, DC, DE, MD, NJ, NY, and PA)

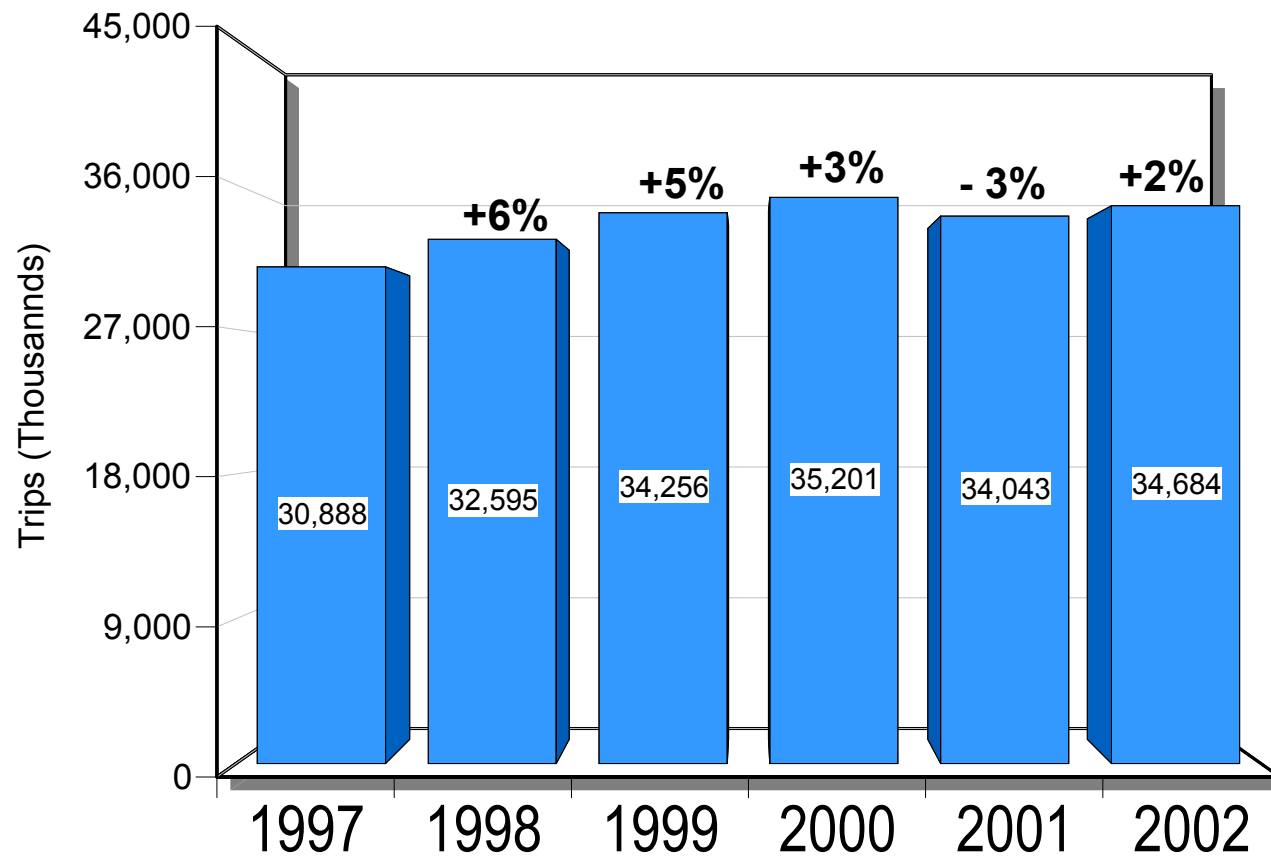
Maine's Day Trips

Maine's Day Trips

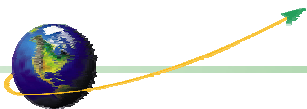


2002 Travel Year

Base: Day Trips

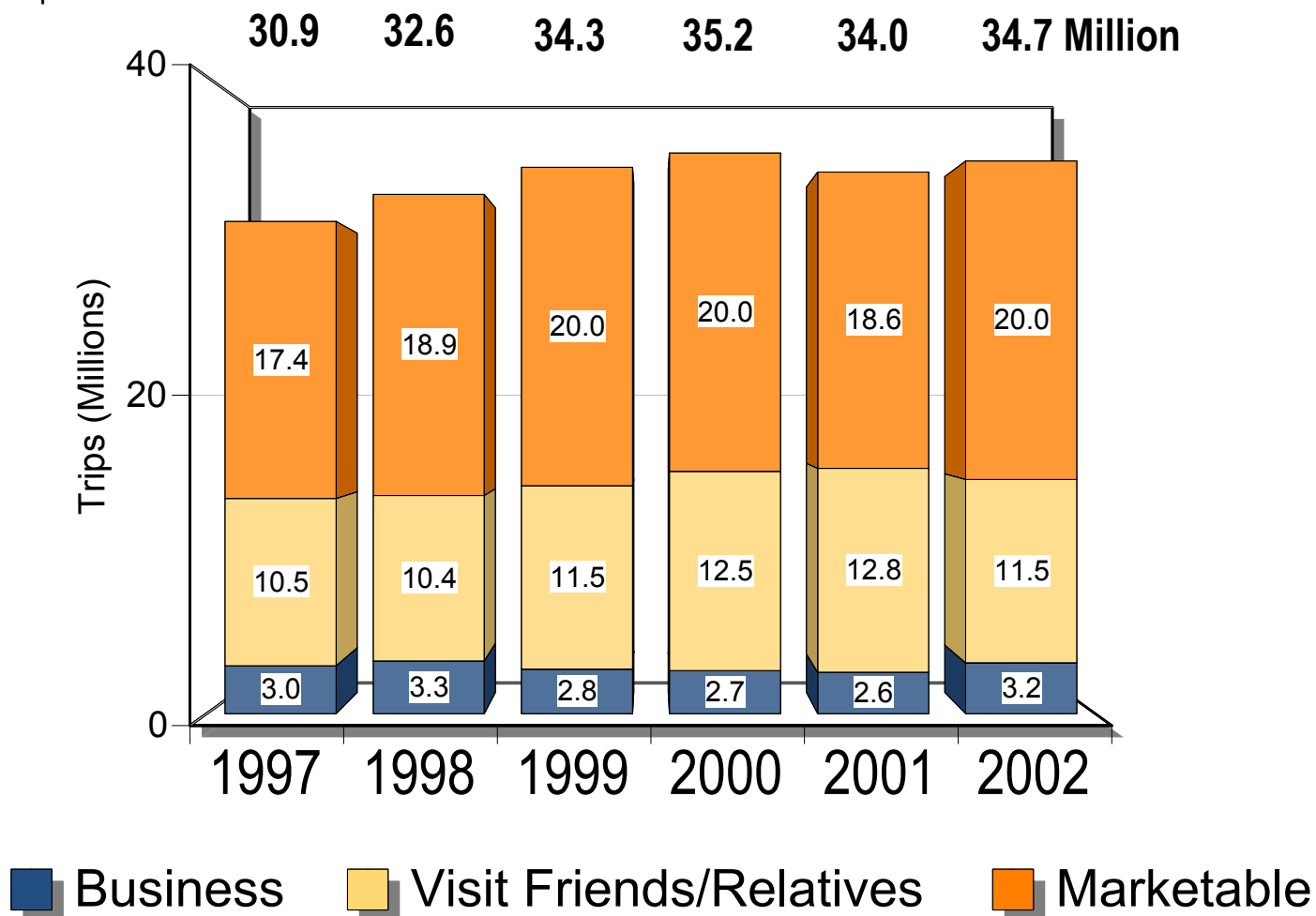


Maine's Day Trip Segments



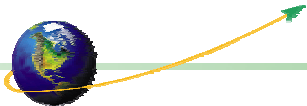
2002 Travel Year

Base: Day Trips



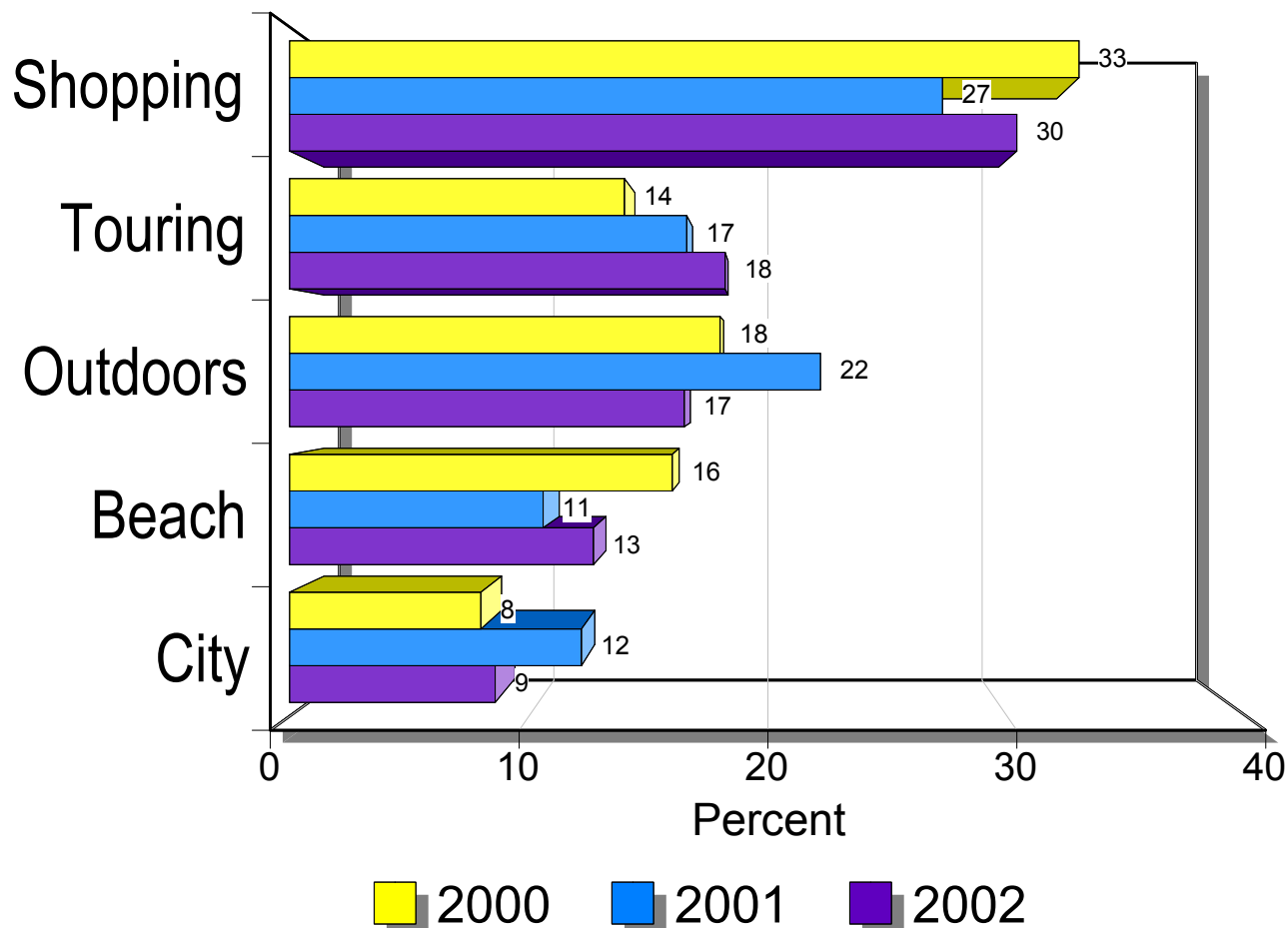
Marketable TripMix

Maine Day Trips



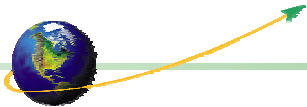
2002 Travel Year

Base: Marketable Day Trips



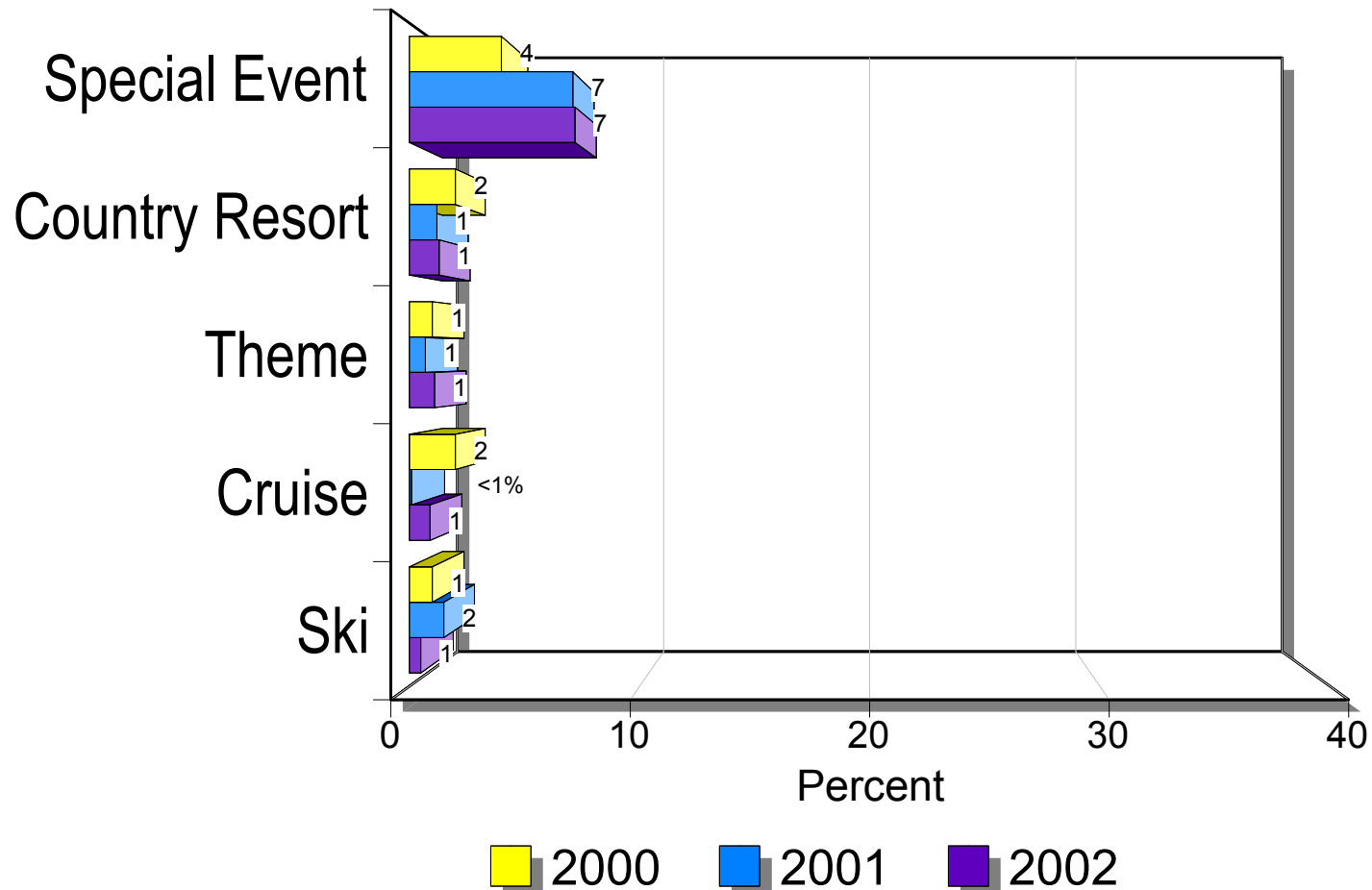
Marketable Trip Mix

Maine Day Trips cont'd



2002 Travel Year

Base: Marketable Day Trips



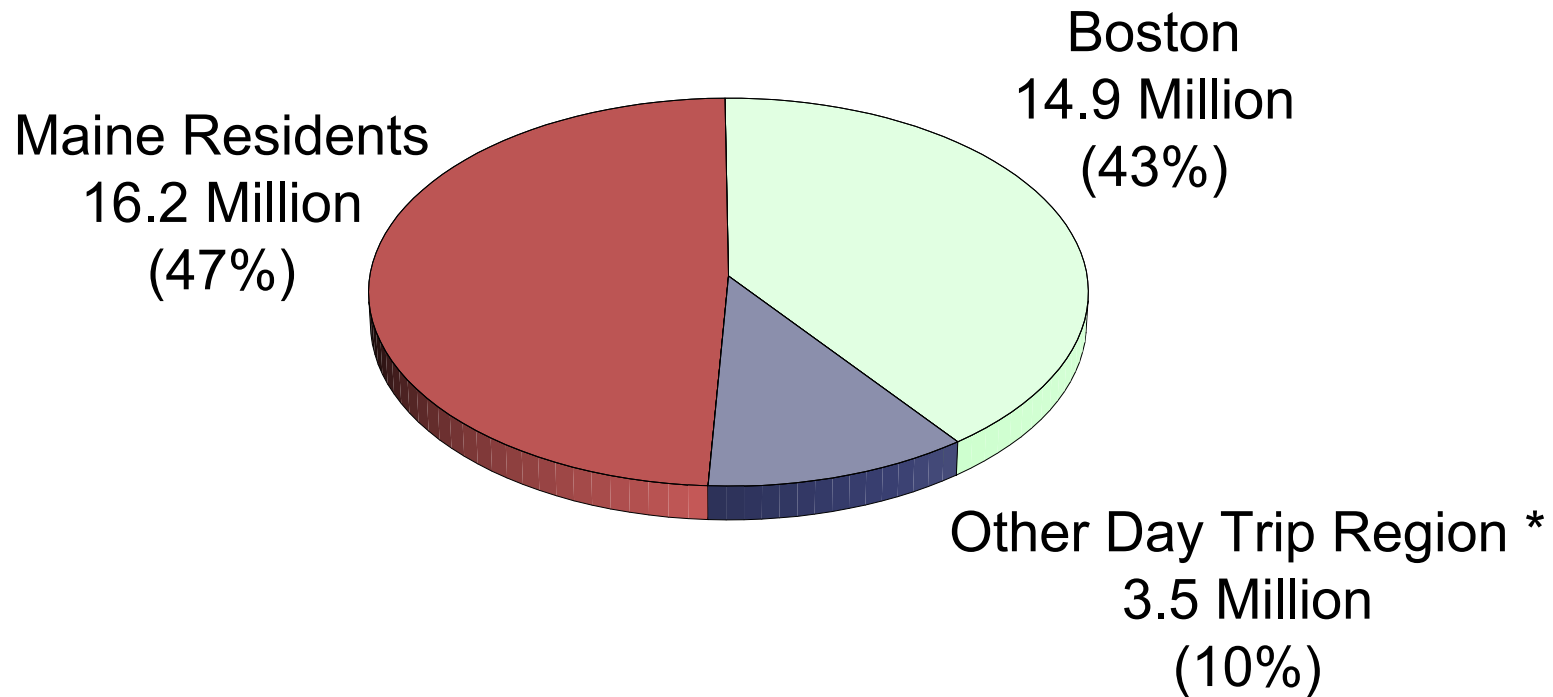
Role of Maine Residents Day Trips



Base: Day Trips

2002 Travel Year

Total = 34.7 Million



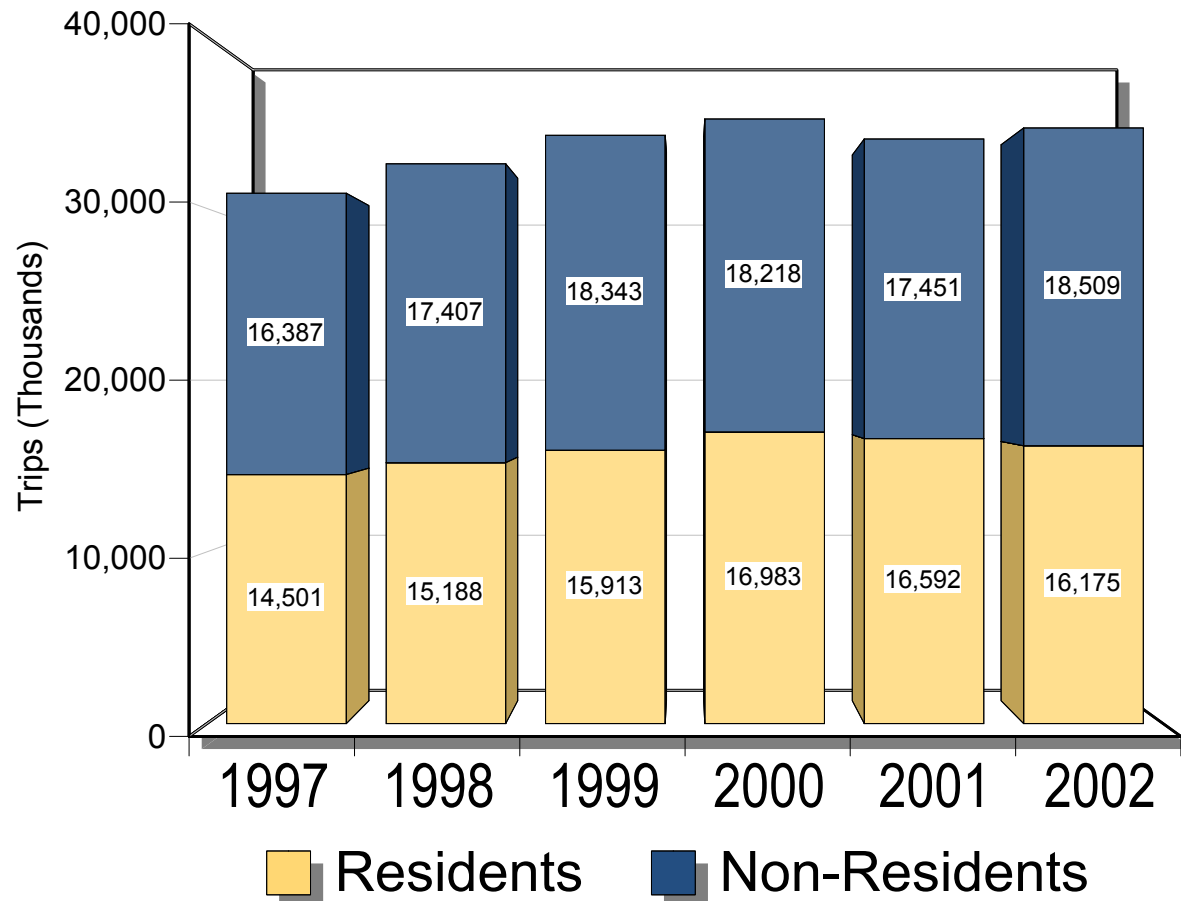
* Includes Connecticut, Massachusetts, New Hampshire, Rhode Island, and Vermont

Role of Maine Residents on Day Trips



2002 Travel Year

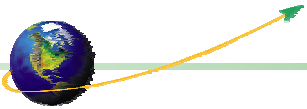
Base: Day Trips



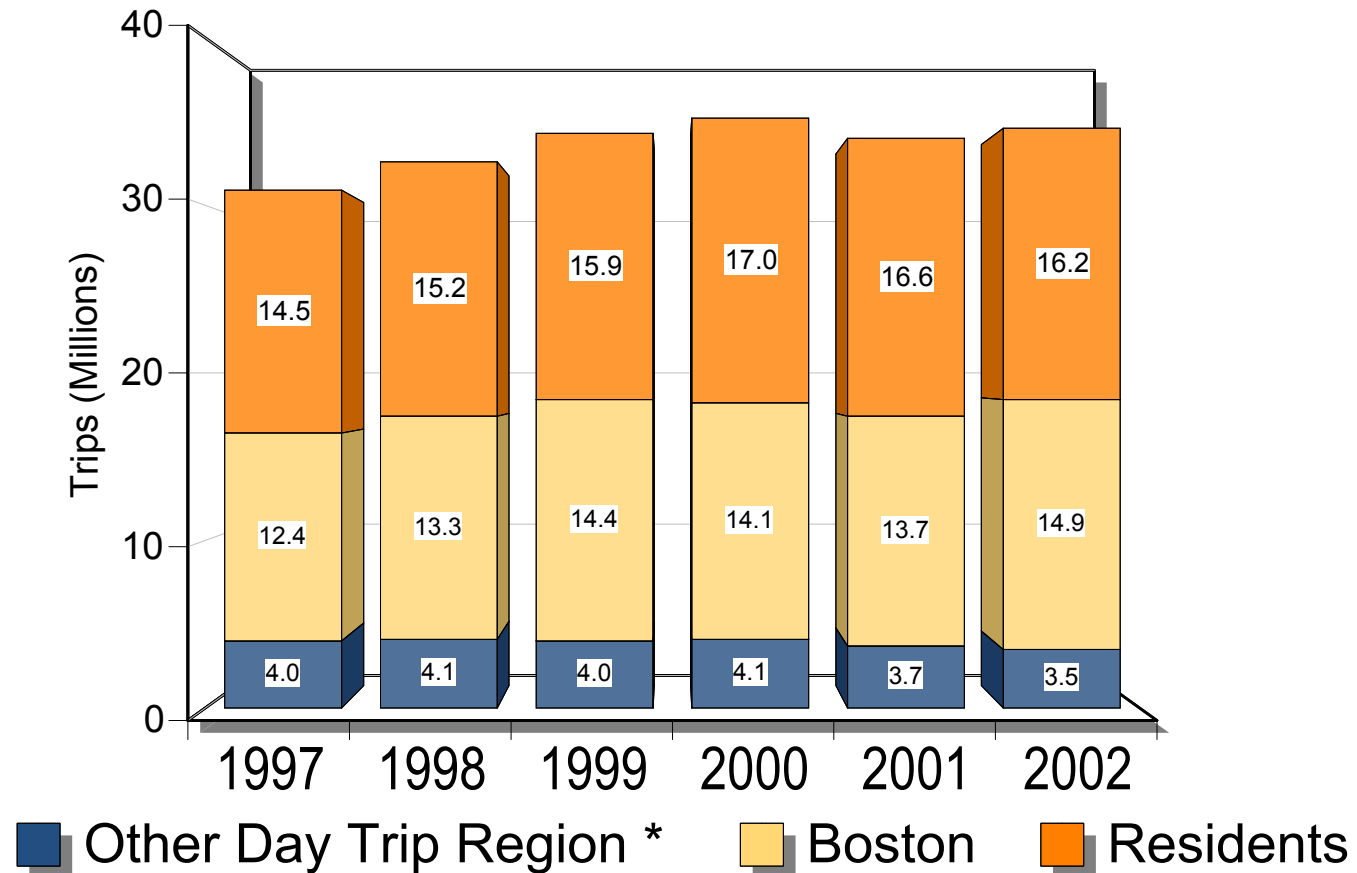
Role of Maine's Residents

Day Trips

2002 Travel Year



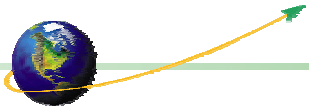
Base: Day Trips



* Includes Connecticut, Massachusetts, New Hampshire, Rhode Island, and Vermont.

Trip Summary

Trips To Maine – 2002

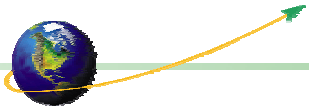


2002 Travel Year

(Millions of trips)

Trip Purpose	Day Trips			Overnight Trips			All Trips
	Residents	Non-Residents	Total Day	Residents	Non-Residents	Total Overnight	
Marketable Pleasure	8.7	11.3	20.0	0.8	3.4	4.3	24.3
VFR	5.8	5.7	11.5	0.9	3.2	4.0	15.5
Business	1.7	1.5	3.2	0.2	0.6	0.8	4.0
Total	16.2	18.5	34.7	1.9	7.2	9.1	43.8

Trips To Maine – 2001



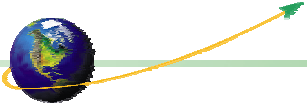
2002 Travel Year

(Millions of trips)

Trip Purpose	Day Trips			Overnight Trips			All Trips
	Residents	Non-Residents	Total Day	Residents	Non-Residents	Total Overnight	
Marketable Pleasure	9.6	9.0	18.6	0.7	3.6	4.3	22.9
VFR	5.6	7.2	12.8	0.6	3.3	3.9	16.7
Business	1.5	1.1	2.6	0.1	0.7	0.8	3.4
Total	16.6	17.4	34.0	1.4	7.6	9.0	43.0

Maine's Competitive Position: Overnight Trips

Competitive Position of Maine

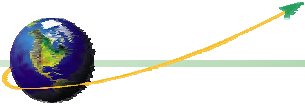


2002 Travel Year

- ⊙ Maine's *national ranking* as a travel destination among the U.S. states changed little from 38th in 2000, to 39th in 2001, and 38th in 2002.
- ⊙ Its ranking was improved by regional share gains within the Outdoor, Touring and Business-Pleasure trip-types.

Maine's Competitive Position

U.S. Travel Market



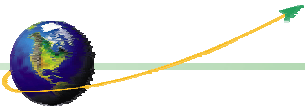
2002 Travel Year

Base: Overnight Trips

Rank of Maine Among 50 U.S. States

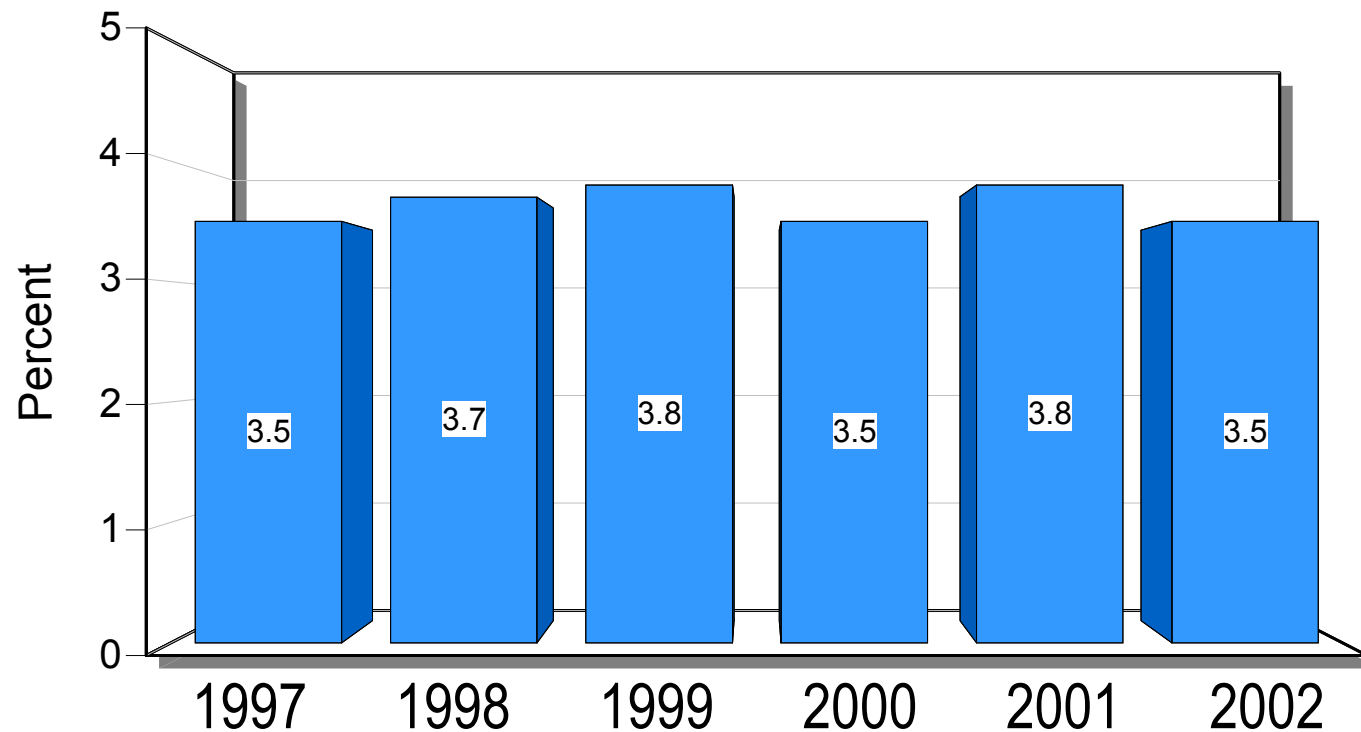
	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>
All Trips	39	39	39	38	39	38
Touring Trips	23	25	25	18	25	25
Outdoors Trips	24	21	15	26	25	23
Beach Trips	18	17	17	19	15	16
Special Event Trips	38	44	48	42	39	44

Maine's Regional Market Share



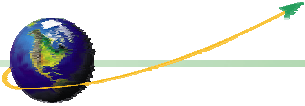
2002 Travel Year

Base: Overnight Marketable Trips by Regional Residents to All Destinations



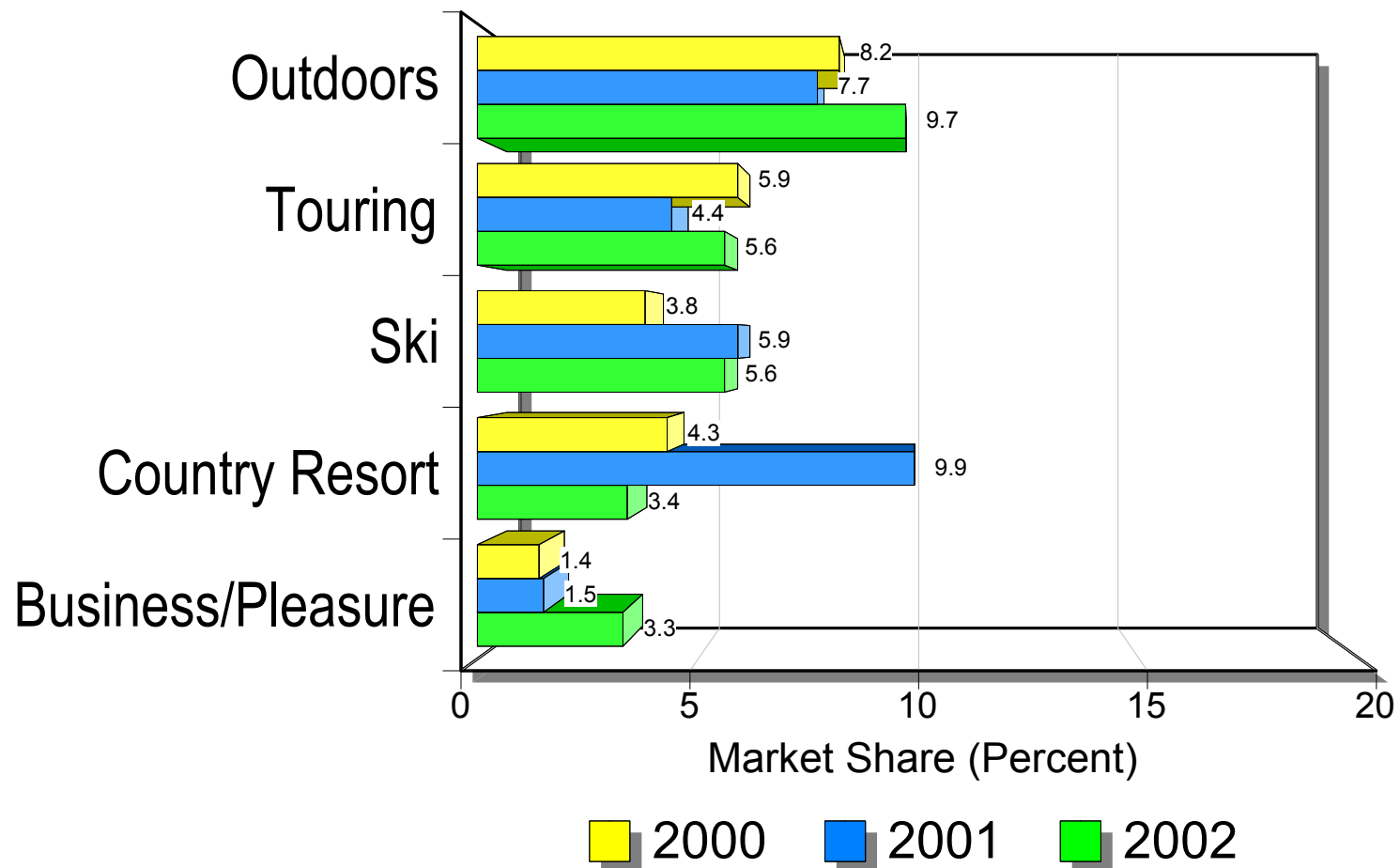
Note: Regional Trips = Trips taken to all destinations by regional residents of New England, DC, DE, MD, NJ, NY, and PA

Maine's Regional Market Share by Marketable Trip Type



2002 Travel Year

Base: Overnight Marketable Trips by Regional Residents to All Destinations *



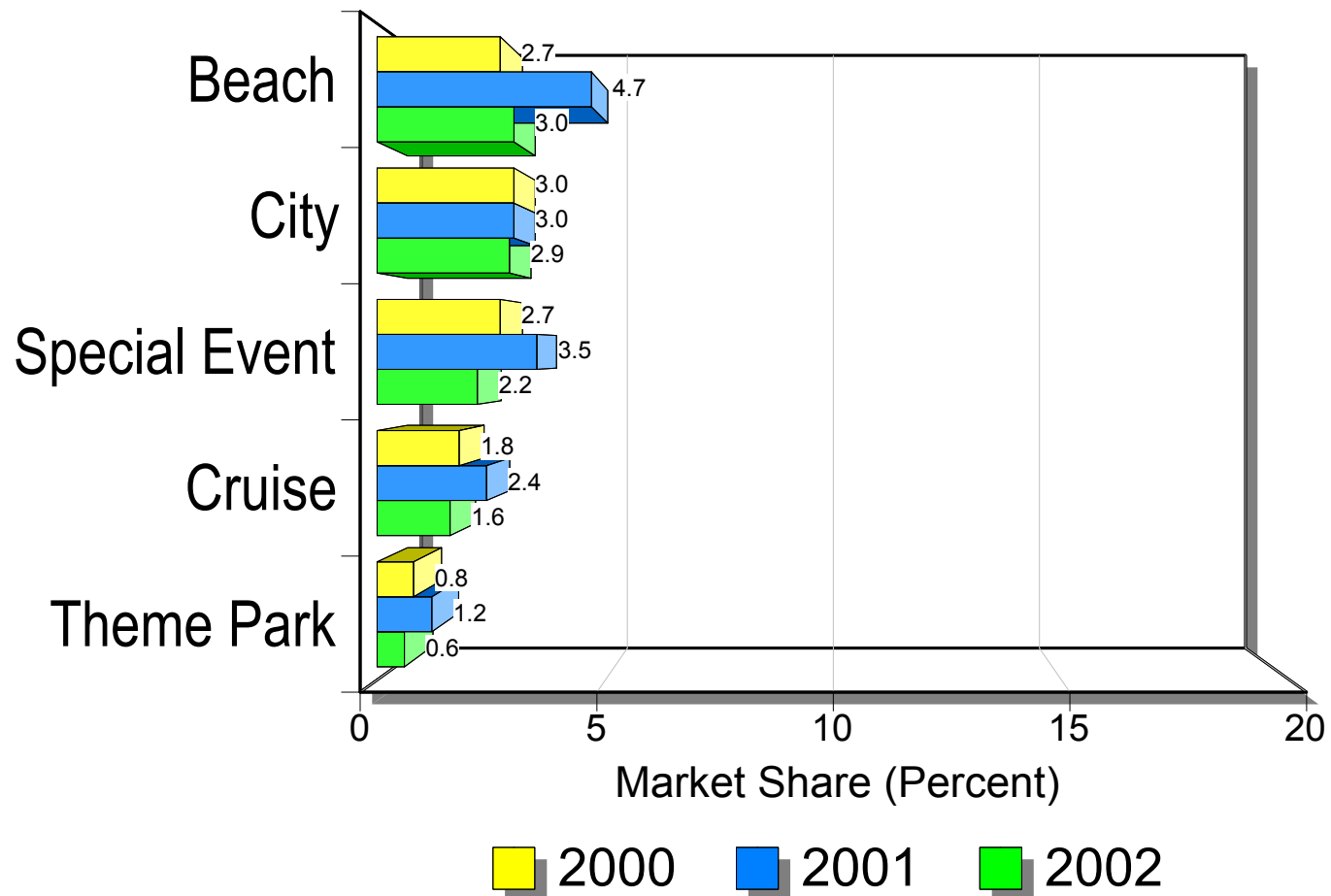
*Residents of New England, DC, DE, MD, NJ, NY, and PA

Maine's Regional Market Share by Marketable Trip Type cont'd



2002 Travel Year

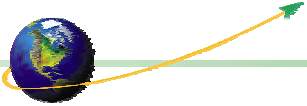
Base: Overnight Marketable Trips by Regional Residents to All Destinations *



*Residents of New England, DC, DE, MD, NJ, NY, and PA

Travel Expenditures

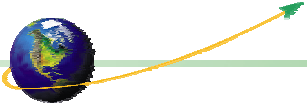
Traveler Expenditures



2002 Travel Year

- ⊙ An estimated \$6.2 billion was spent in Maine by travelers in 2002 -
 - ⊙ *up 10% from the previous year and building on the 4% growth of 2000 and the 7% growth of 2001 and,*
 - ⊙ *driven by the 2% increase in number of trips and higher spending per trip,*
 - ⊙ *to a level 29% higher than total expenditures in 1997.*
- ⊙ Day trips contributed 57% of the \$6.2 billion (versus 79% of trips) or \$3.6 billion.
- ⊙ Overnight trips contributed 42% (versus 21% of trips) or \$2.6 billion.

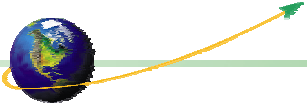
Traveler Expenditures cont'd



2002 Travel Year

- ◉ Marketable Trips contributed \$3.8 billion or 62% of the \$6.2 billion total, followed in importance by:
 - ◉ *VFR (\$2.0 billion) and Business Trips (\$0.4 billion).*
- ◉ Out-of-state travelers made a significant contribution to Maine's economy,
 - ◉ *spending \$4.2 billion across Overnight (\$2.2 billion) and Day trips (\$2.0 billion).*

Traveler Expenditures cont'd

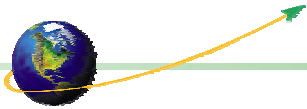


2002 Travel Year

- The benefits by category, in rank order, are:
 - *Retail – 32% of the \$6.2 billion total or \$2.0 billion*
 - *Restaurant Food — 30% or \$1.8 billion*
 - *Transportation — 15% or \$1.0 billion*
 - *Accommodation — 12% or \$0.7 billion*
 - *Recreation — 11% or \$0.7 billion*

Travel Expenditures In Maine

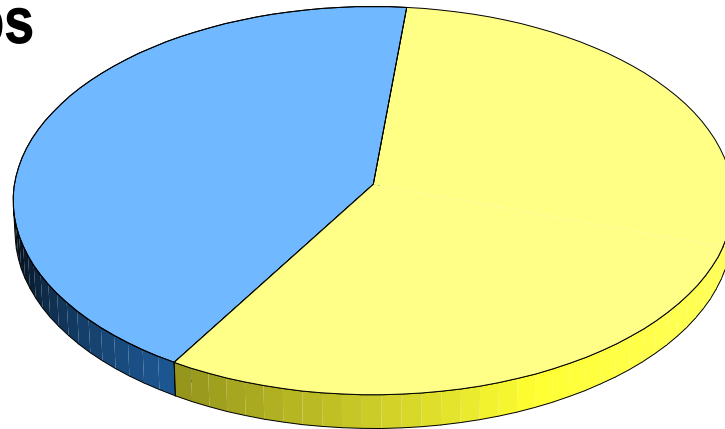
2002 Travel Year



2002 Travel Year

Total = \$6.2 Billion

Overnight Trips
\$2.6 Billion
(43%)



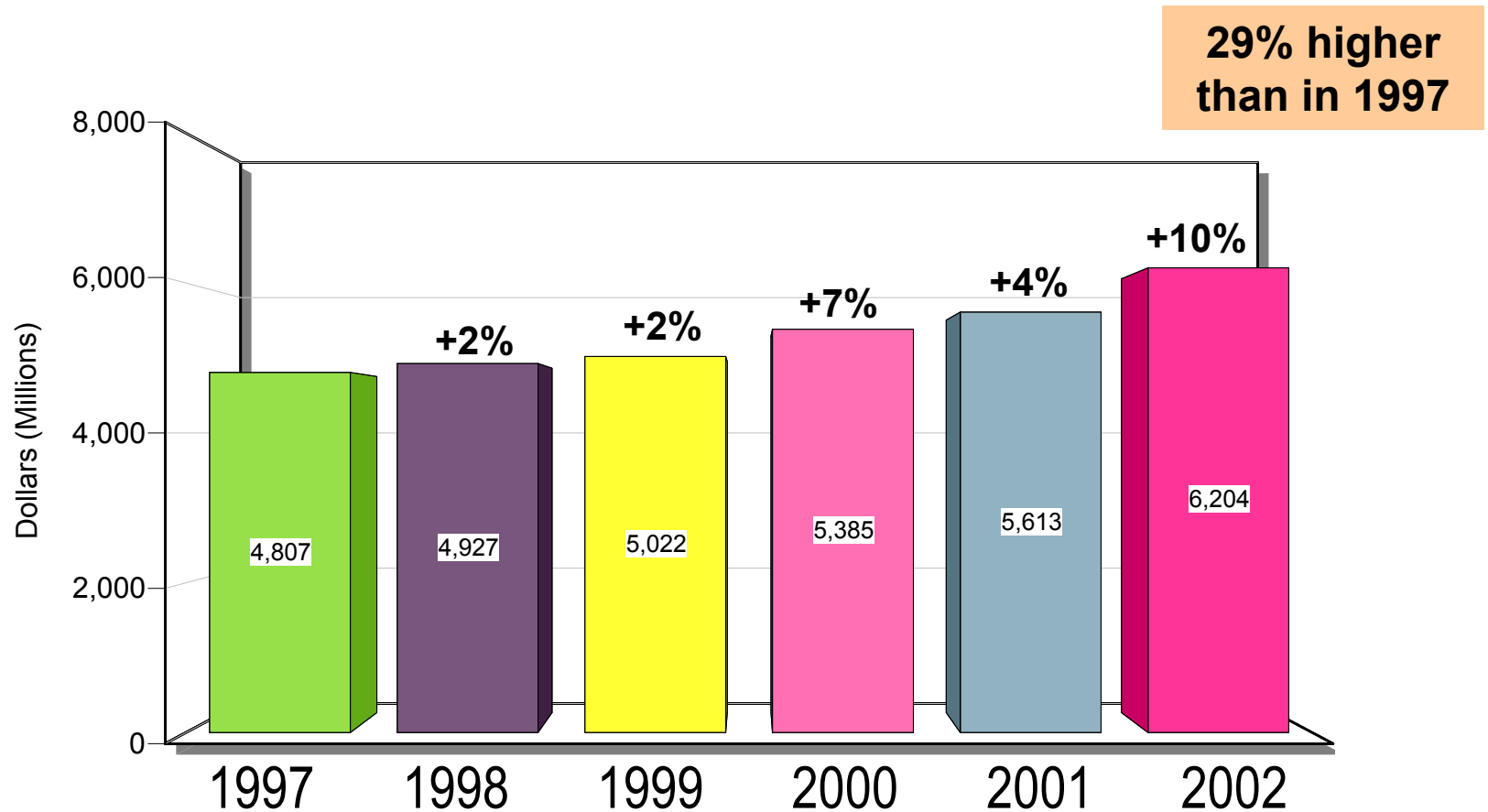
Day Trips
\$3.6 Billion
(57%)

Total Travel Expenditures in Maine Across Overnight & Day Trips



2002 Travel Year

Base: Total Overnight and Day Trips

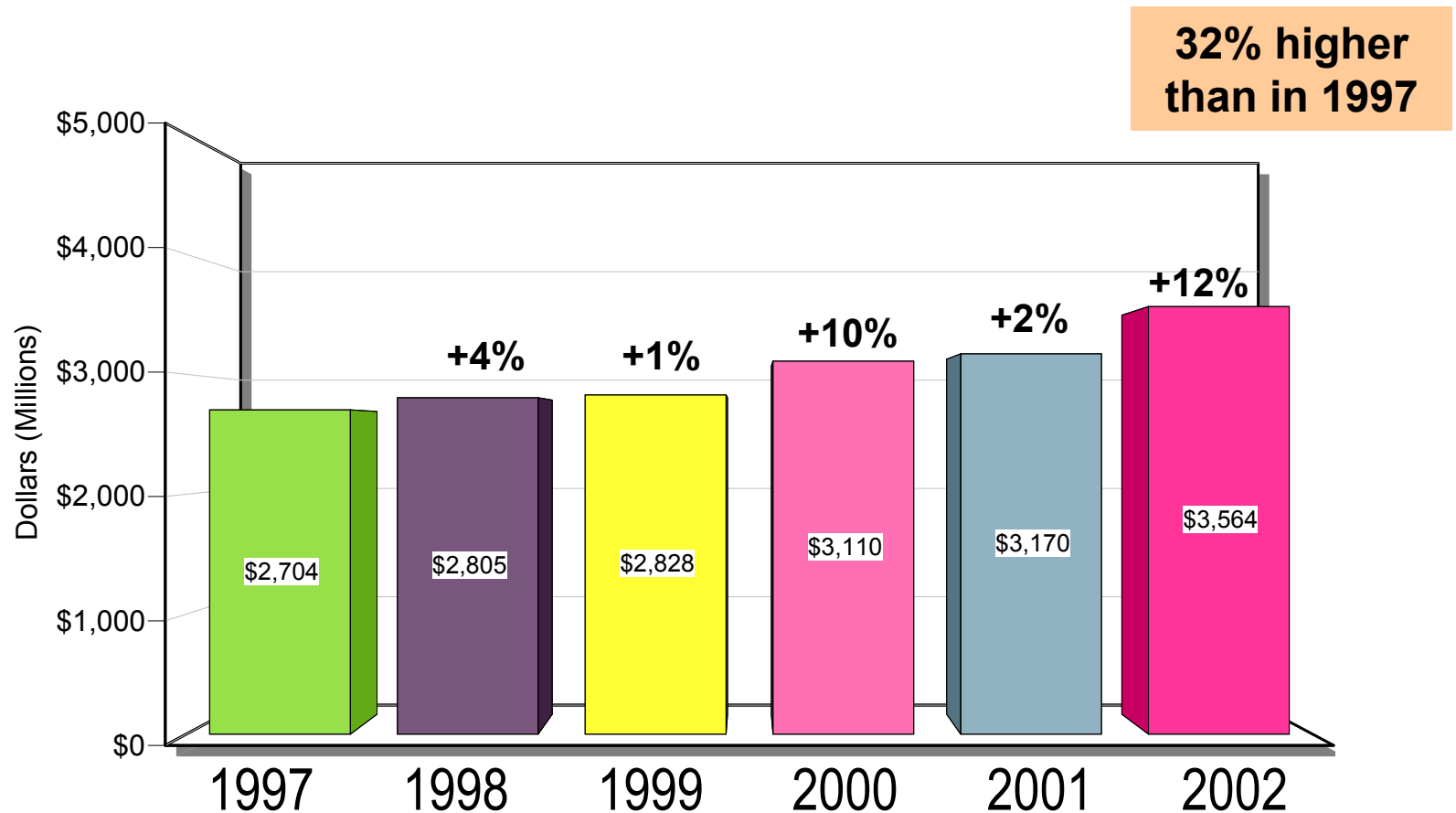


Travel Expenditures in Maine on Day Trips



2002 Travel Year

Base: Day Trips

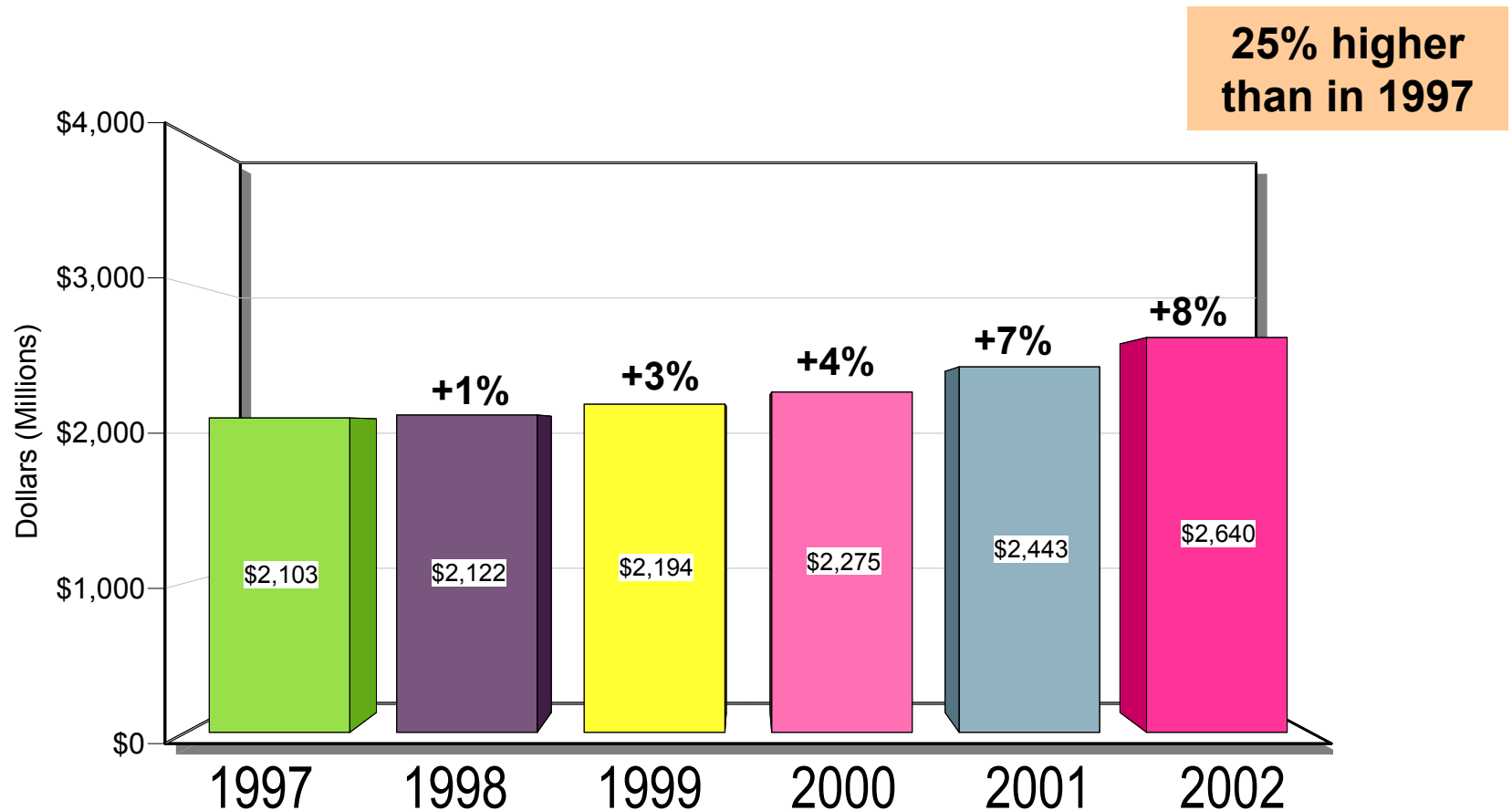


Travel Expenditures in Maine on Overnight Trips



2002 Travel Year

Base: Overnight Trips



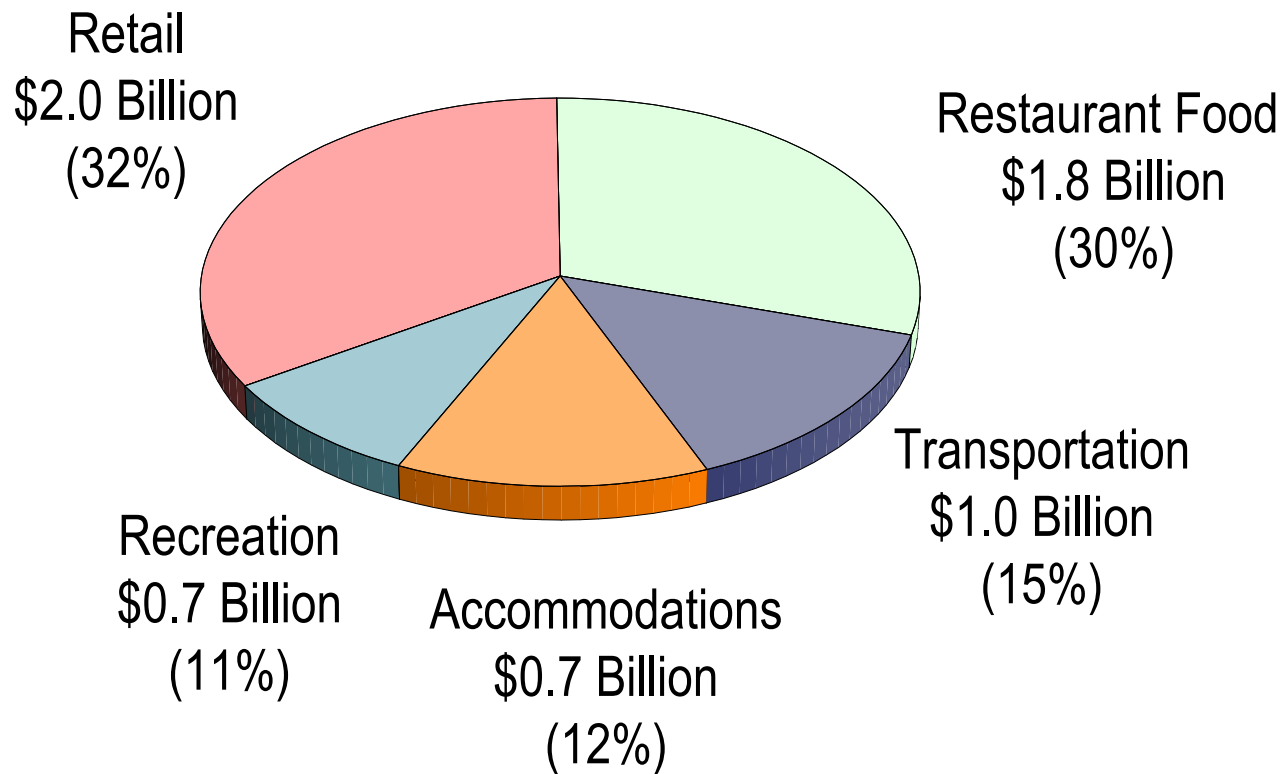
Travel Expenditures By Category



2002 Travel Year

Base: Total Overnight and Day Trips

Total = \$6.2 Billion



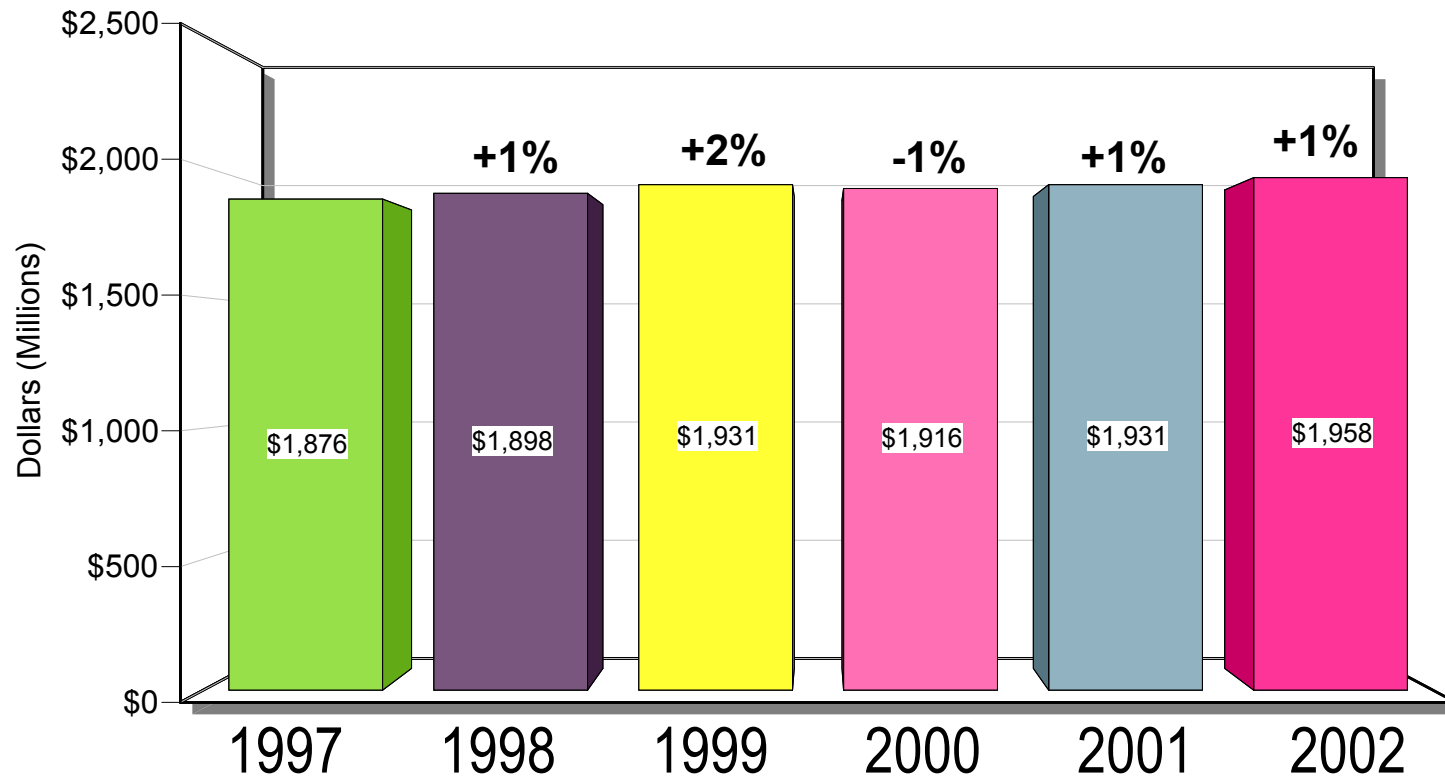
Travel Expenditures by Category

Retail



2002 Travel Year

Base: Total Overnight and Day Trips



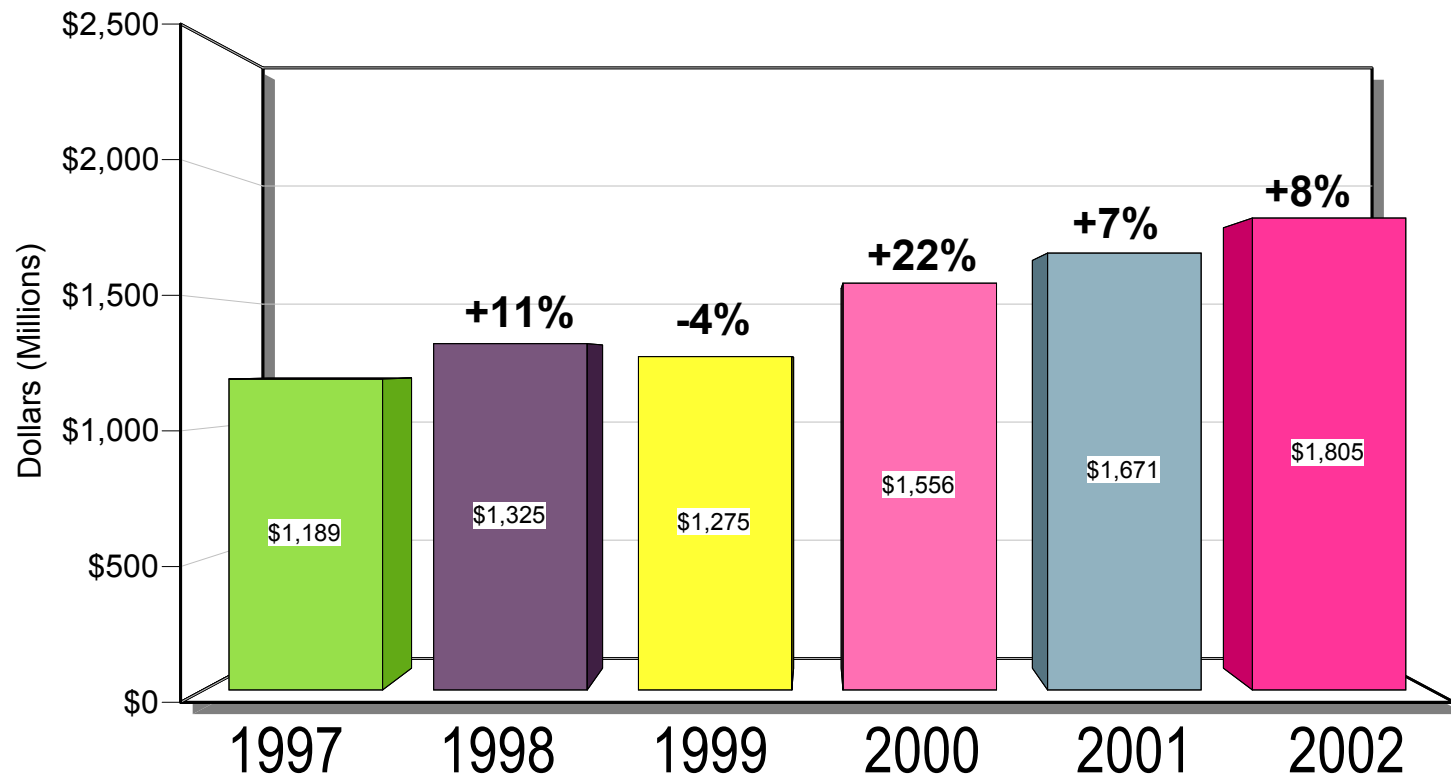
Travel Expenditures by Category

Restaurant Food



2002 Travel Year

Base: Total Overnight and Day Trips



Note: Includes Restaurant Food & Beverage expenditures for Breakfast, Lunch, Dinner and Snacks

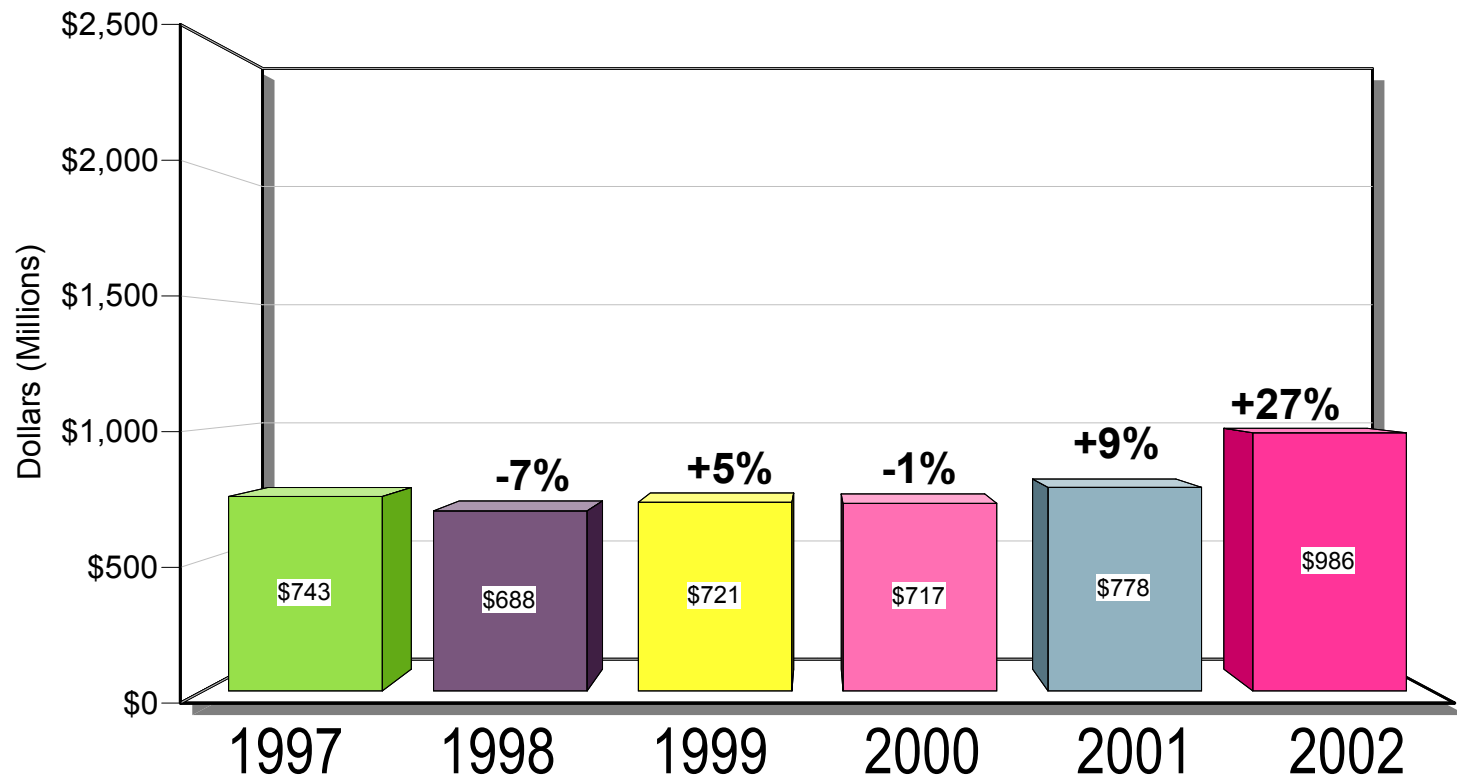
Travel Expenditures by Category

Transportation



2002 Travel Year

Base: Total Overnight and Day Trips



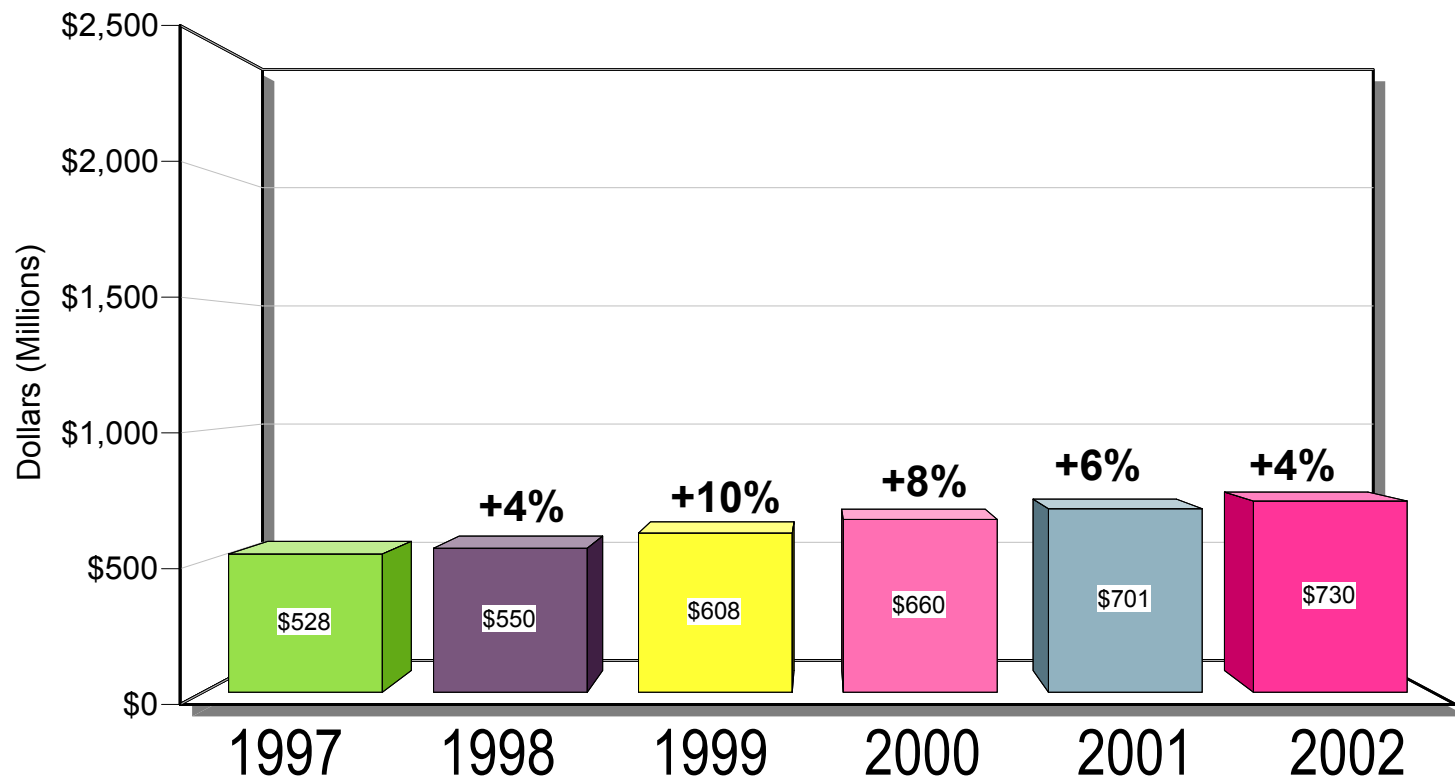
Travel Expenditures by Category

Accommodations



2002 Travel Year

Base: Total Overnight and Day Trips



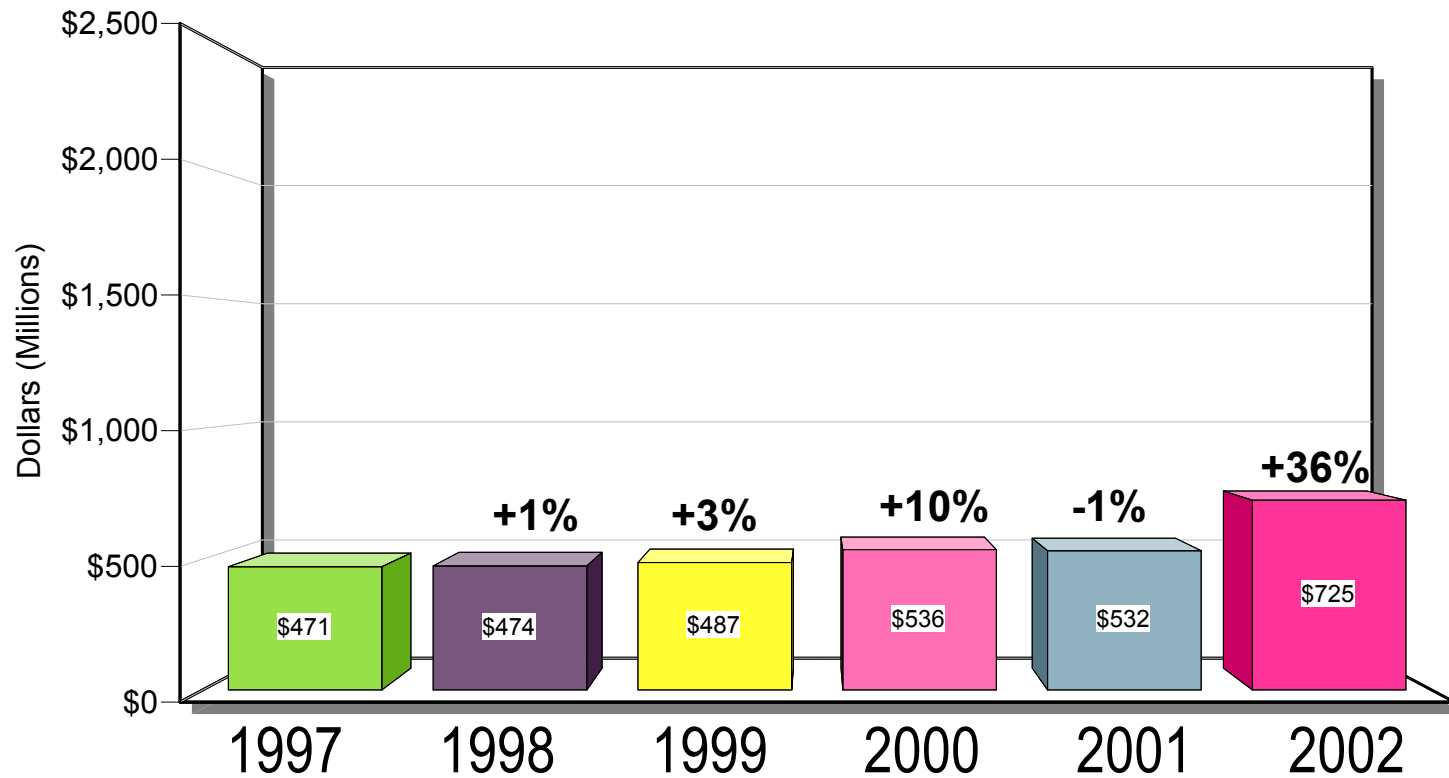
Travel Expenditures by Category

Recreation



2002 Travel Year

Base: Total Overnight and Day Trips



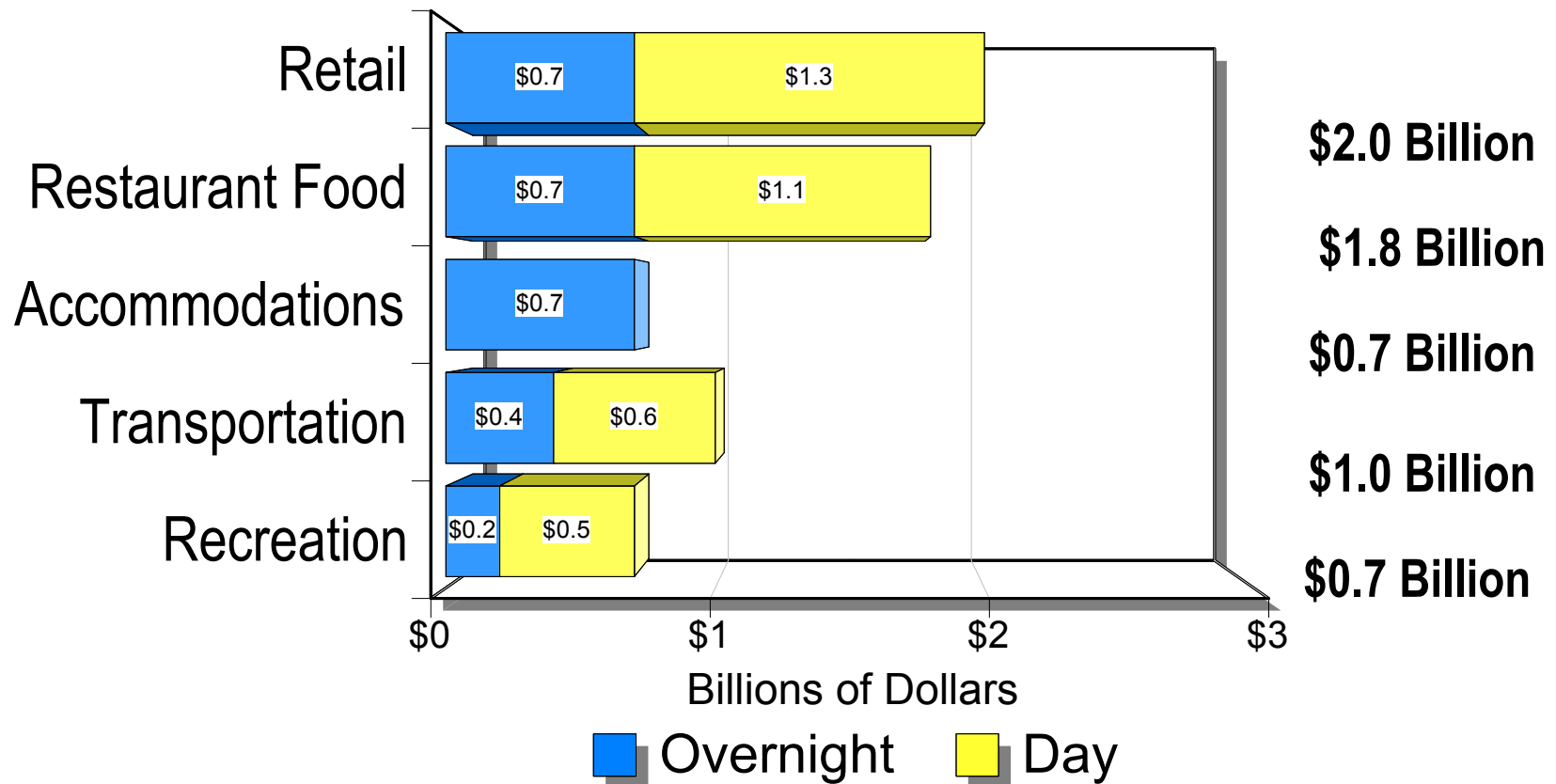
Travel Expenditures By Sector

Overnight vs. Day Trips



2002 Travel Year

Base: Total Overnight and Day Trips



Travel Expenditures By Purpose Of Trip

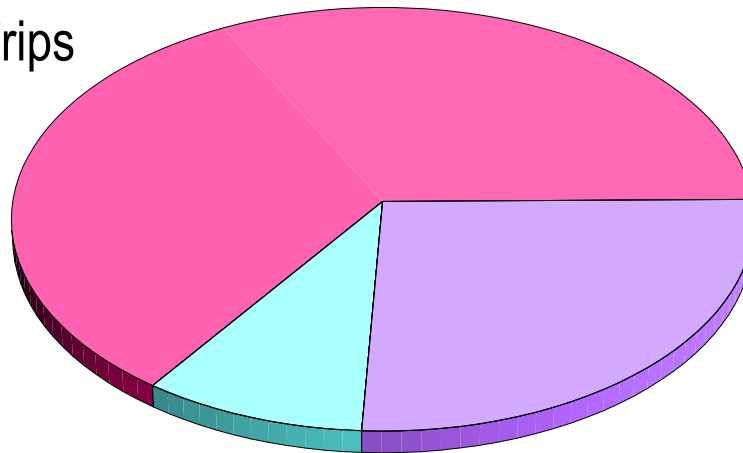
2002 Travel Year



Base: Total Overnight and Day Trips

Total: \$6.2 Billion

Marketable Pleasure Trips
\$3.8 Billion
(62%)



Visit Friends/Relatives
\$2.0 Billion
(32%)

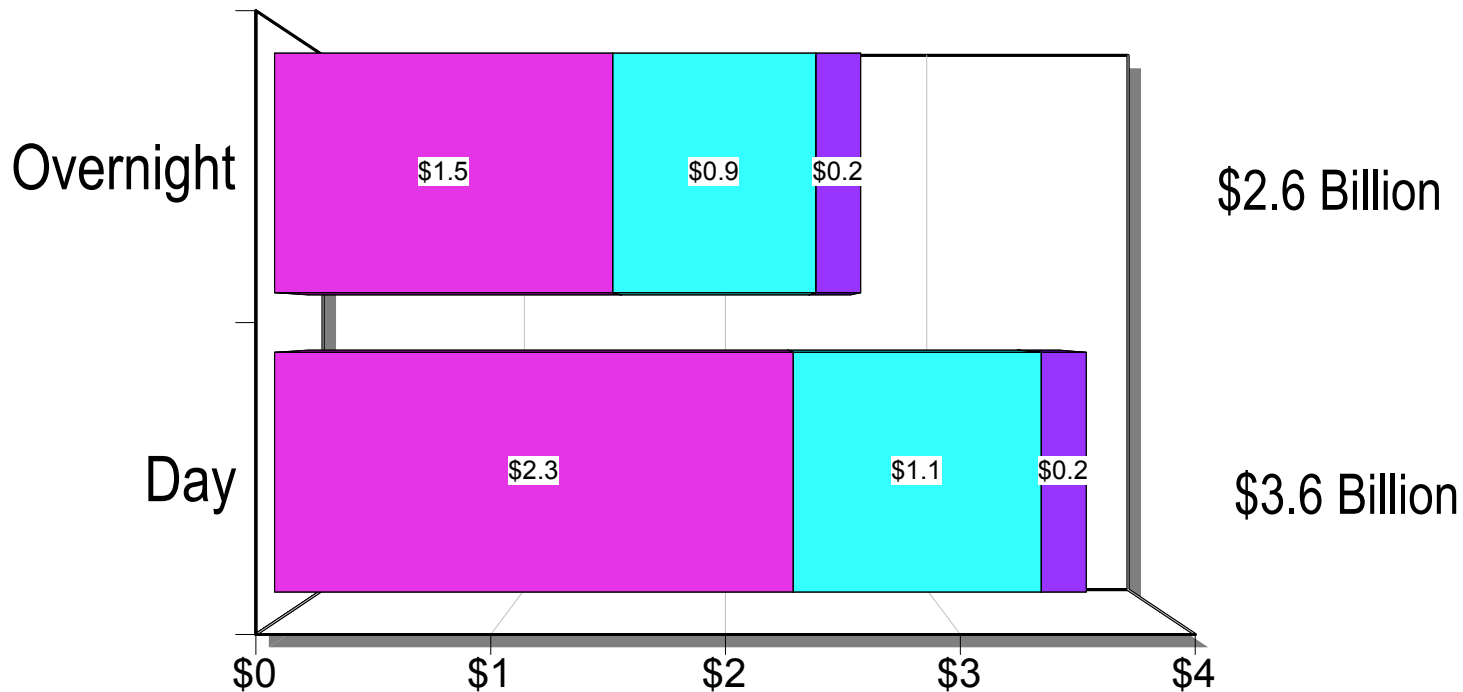
Business Trips
\$0.4 Billion
(6%)

Travel Expenditures By Purpose Of Trip

2002 Travel Year



Base: Total Overnight and Day Trips



■ Marketable Pleasure ■ Visit Friends/Relatives ■ Business

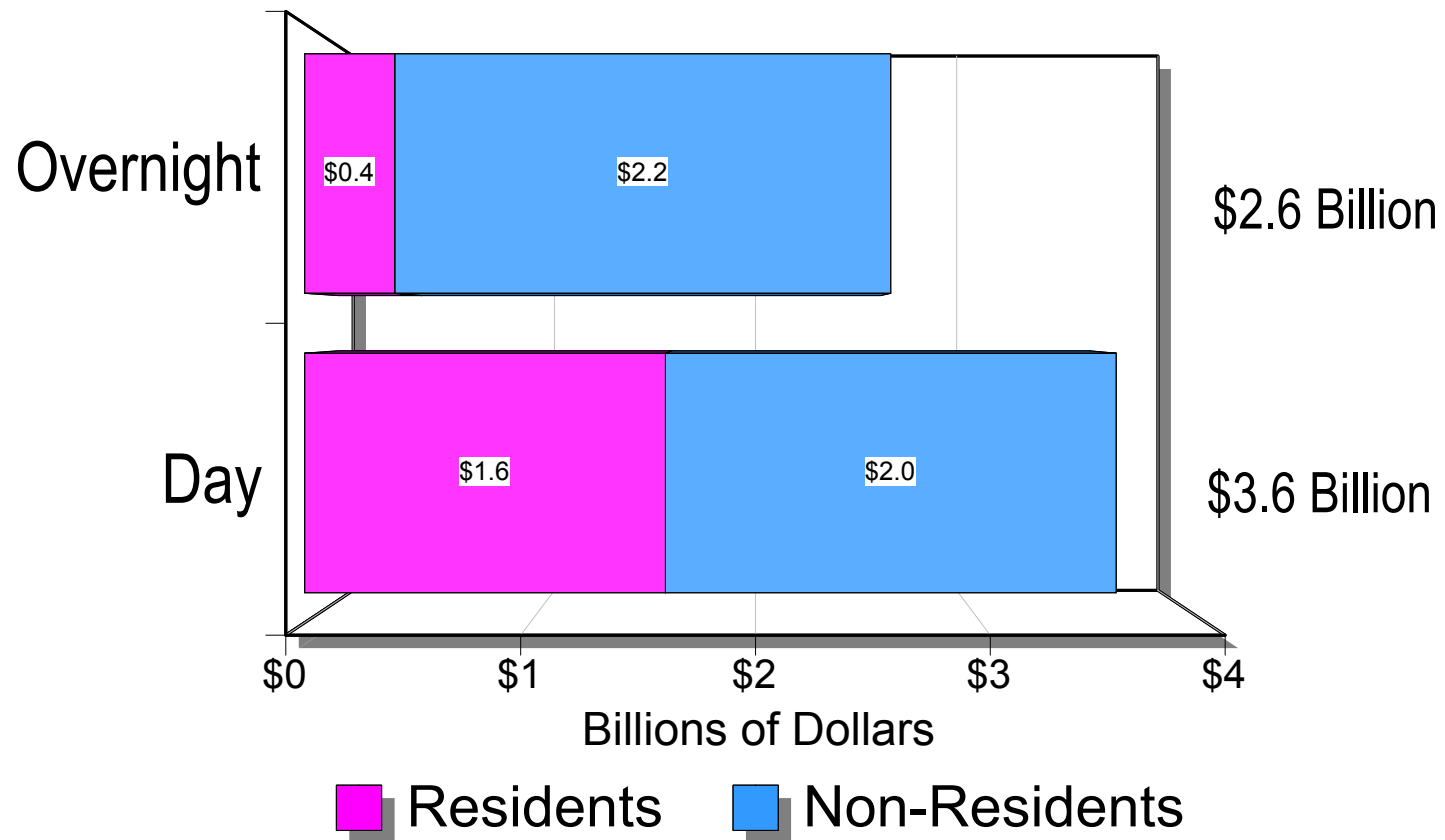
Travel Expenditures

Role Of Maine Residents



2002 Travel Year

Base: Overnight and Day Trips

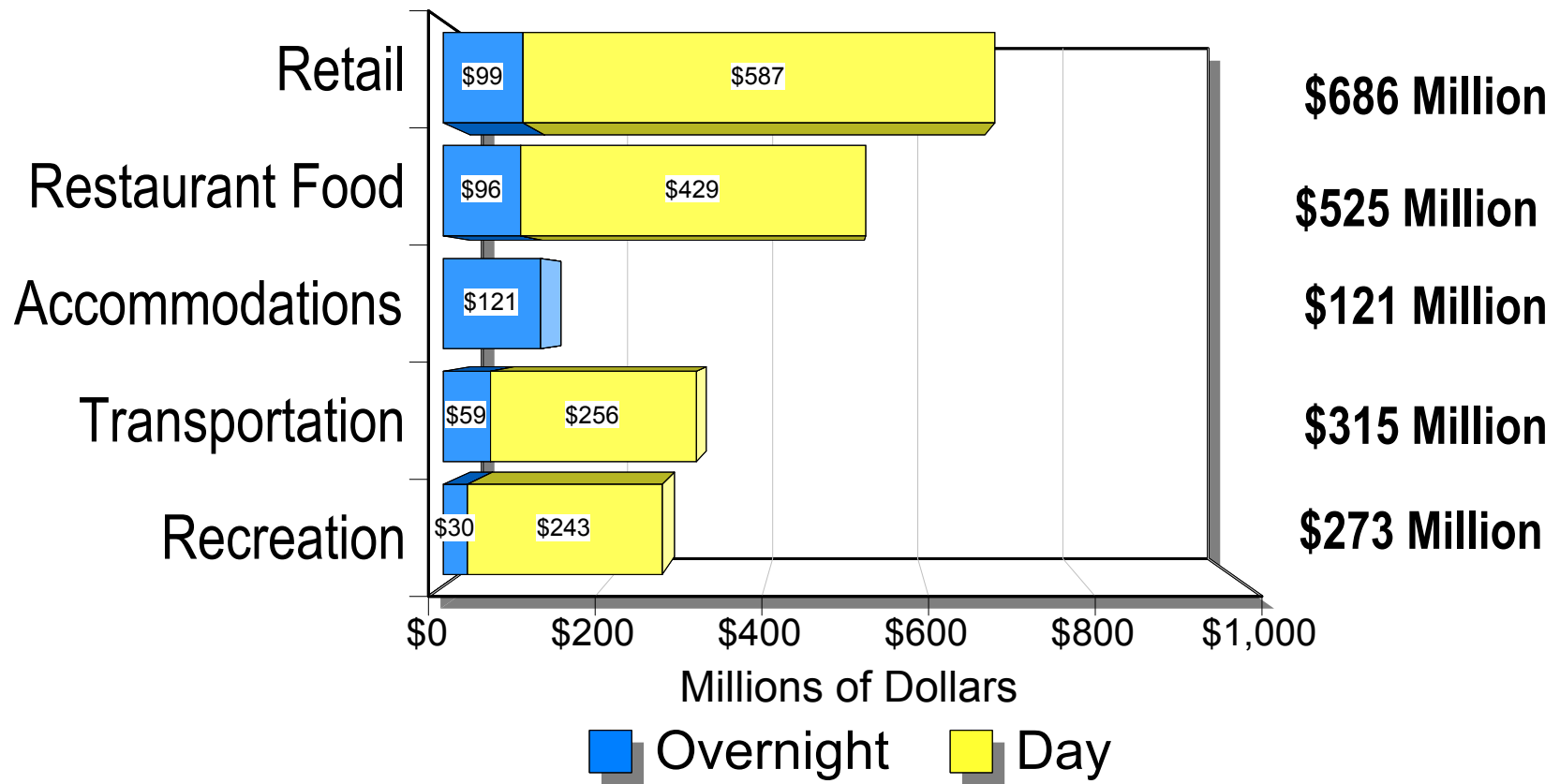


Travel Expenditures By Sector by Residents of Maine



2002 Travel Year

Base: Total Overnight and Day Trips

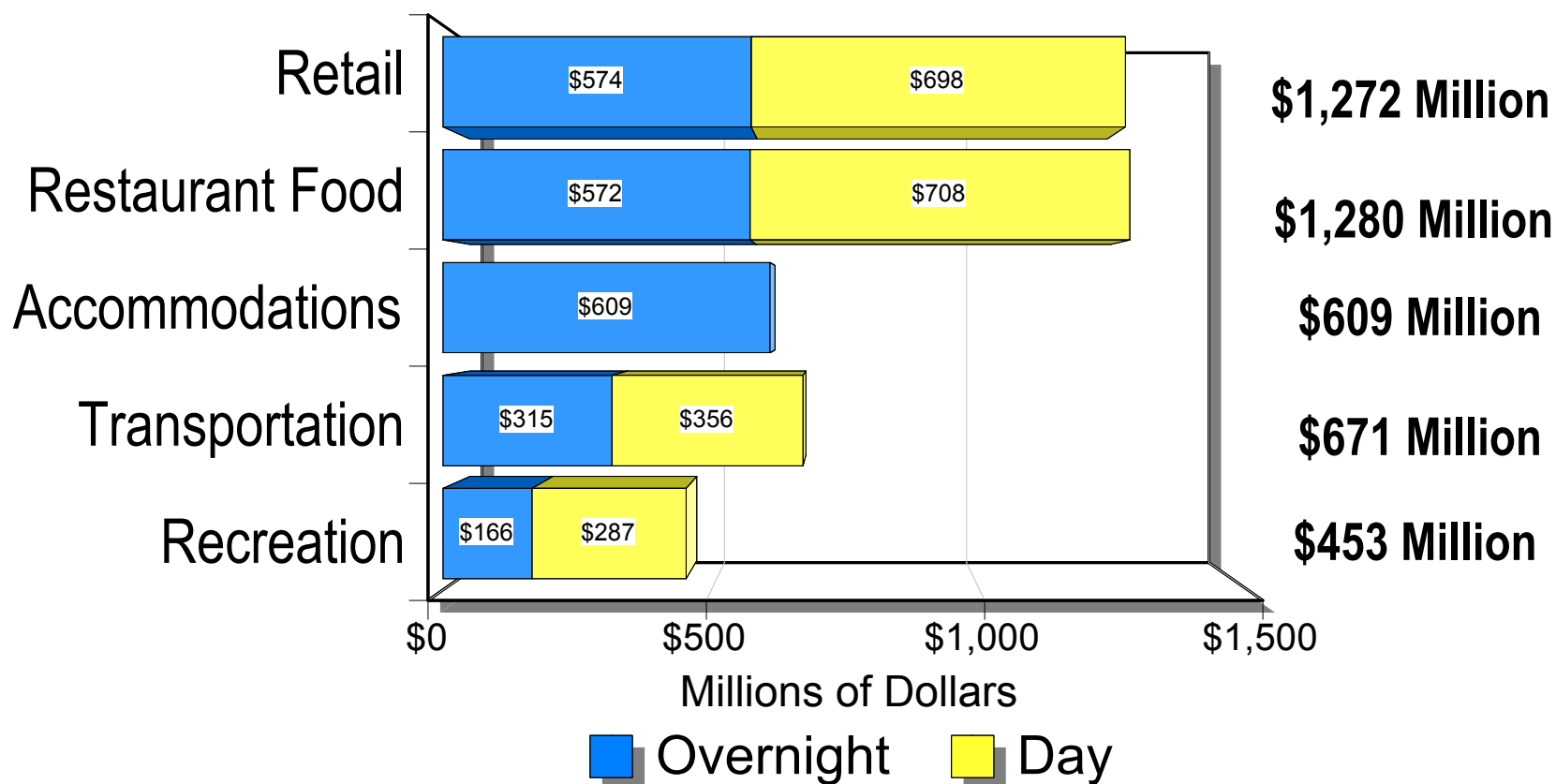


Travel Expenditures By Sector by Non-Residents of Maine

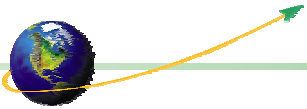


2002 Travel Year

Base: Total Overnight and Day Trips



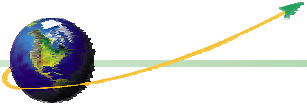
Economic Impacts



2002 Travel Year

- ◉ The economic impacts of tourism reported herein were provided by the Maine's State Planning Office, based on Longwoods' expenditure estimates.
- ◉ Resident and Non-Resident travel generated:
 - ◉ *\$13.9 billion in sales of goods and services*
 - ◉ *181,090 jobs, with a payroll of \$3.9 billion*
 - ◉ *\$556 million in tax revenues.*

Economic Impacts cont'd



2002 Travel Year

- ◉ Non-Resident travel generated just over two-thirds of the total economic impact or:
 - ◉ *\$9.5 billion in sales of goods and services,*
 - ◉ *124,000 jobs with a payroll of \$2.7 billion,*
 - ◉ *\$377 million in tax revenues.*

Economic Impacts of Tourism
Trips by Residents & Non-Residents

Economic Impact of Tourism

Trips by Residents & Non-Residents



2002 Travel Year

Base: Maine Trips by Residents & Non-Residents

	<u>2000</u>	<u>2001</u>	<u>2002</u>
Total Sales	\$12.0 Billion	\$12.5 Billion	\$13.9 Billion
Total Taxes	\$467 Million	\$496 Million	\$556 Million
Jobs Created	155,497	161,033	181,090
Total Payroll	\$3.4Billion	\$3.5 Billion	\$3.9 Billion

Sales by Sector in 2002

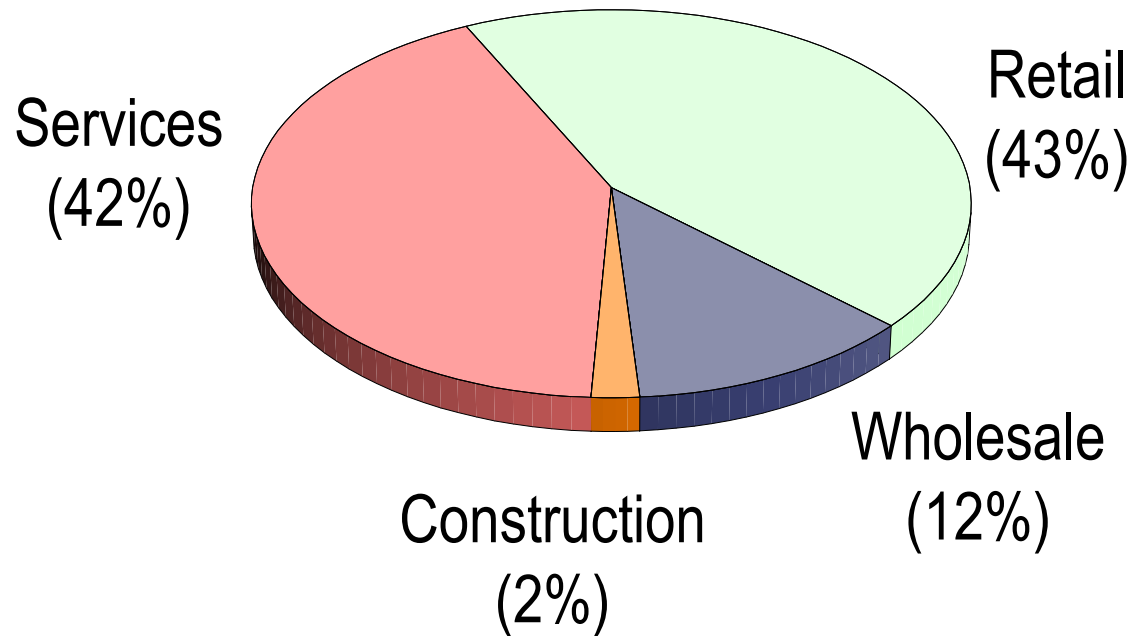
Trips by Residents & Non-Residents



2002 Travel Year

Base: Maine Trips by Residents & Non-Residents

Total: \$13.9 Billion



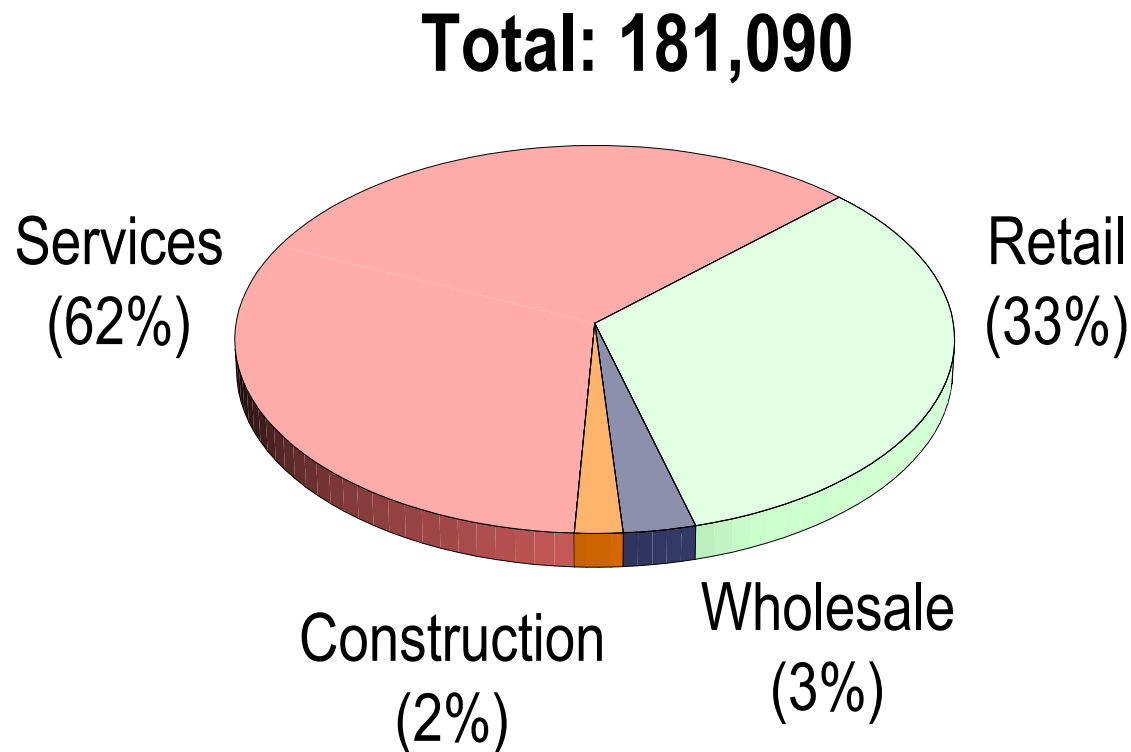
Job Creation by Sector in 2002

Trips by Residents & Non-Residents



2002 Travel Year

Base: Maine Trips by Residents & Non-Residents



Tax Revenues from Tourism in 2002

Trips by Residents & Non-Residents

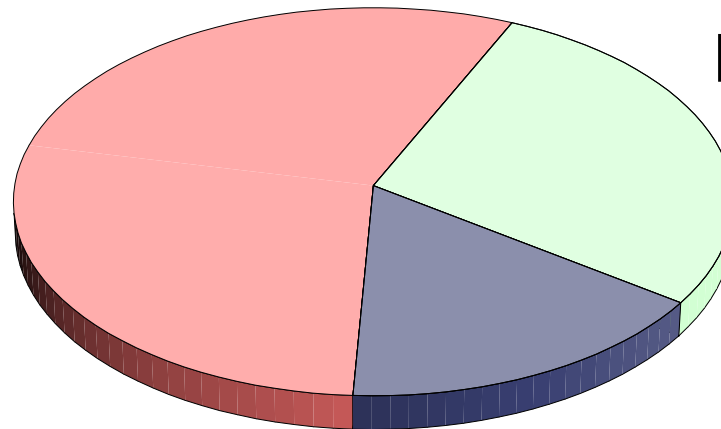


2002 Travel Year

Base: Maine Trips by Residents & Non-Residents of Maine

Total: \$556.3 Million

Sales Tax
\$302.0 Million
(54%)



Personal Income Tax
\$153.2 Million
(28%)

Gasoline Tax
\$101.1 Million
(18%)

Economic Impacts of Tourism

Trips by Non-Residents

Economic Impact of Tourism

Trips by Non-Residents



2002 Travel Year

Base: Trips by Non-Residents to Maine

	<u>2000</u>	<u>2001</u>	<u>2002</u>
Total Sales	\$8.8 Billion	\$8.9 Billion	\$9.5 Billion
Total Taxes	\$330 Million	\$344 Million	\$377 Million
Jobs Created	116,000	115,000	124,000
Total Payroll	\$2.5 Billion	\$2.5 Billion	\$2.7 Billion

Sales by Sector

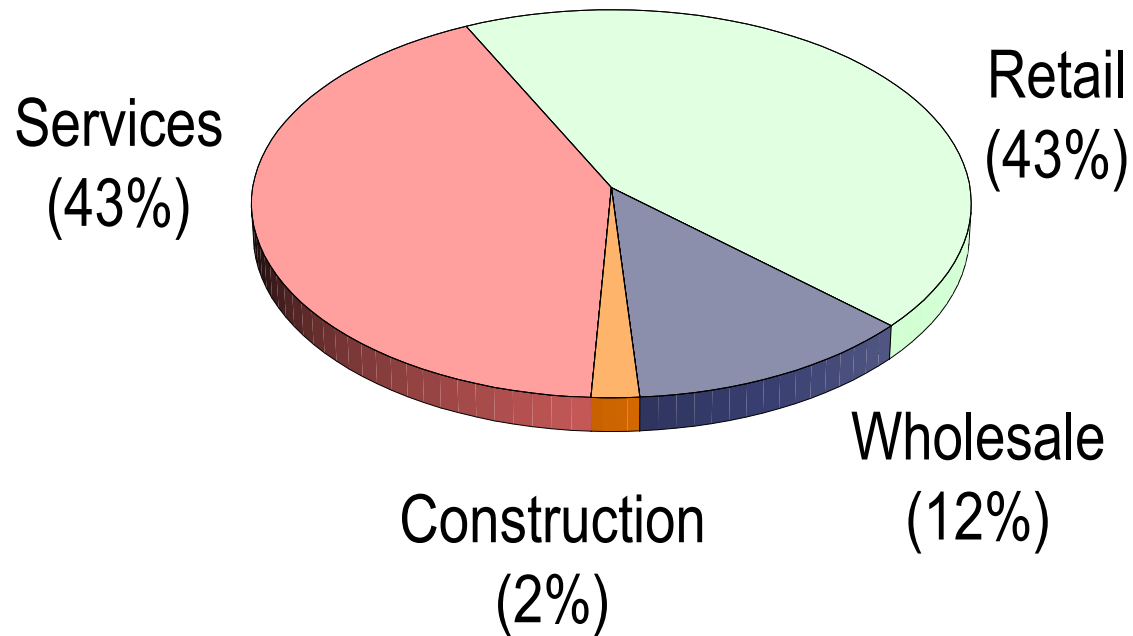
Trips by Non-Residents



2002 Travel Year

Base: Trips by Non-Residents to Maine

Total: \$9.5 Billion



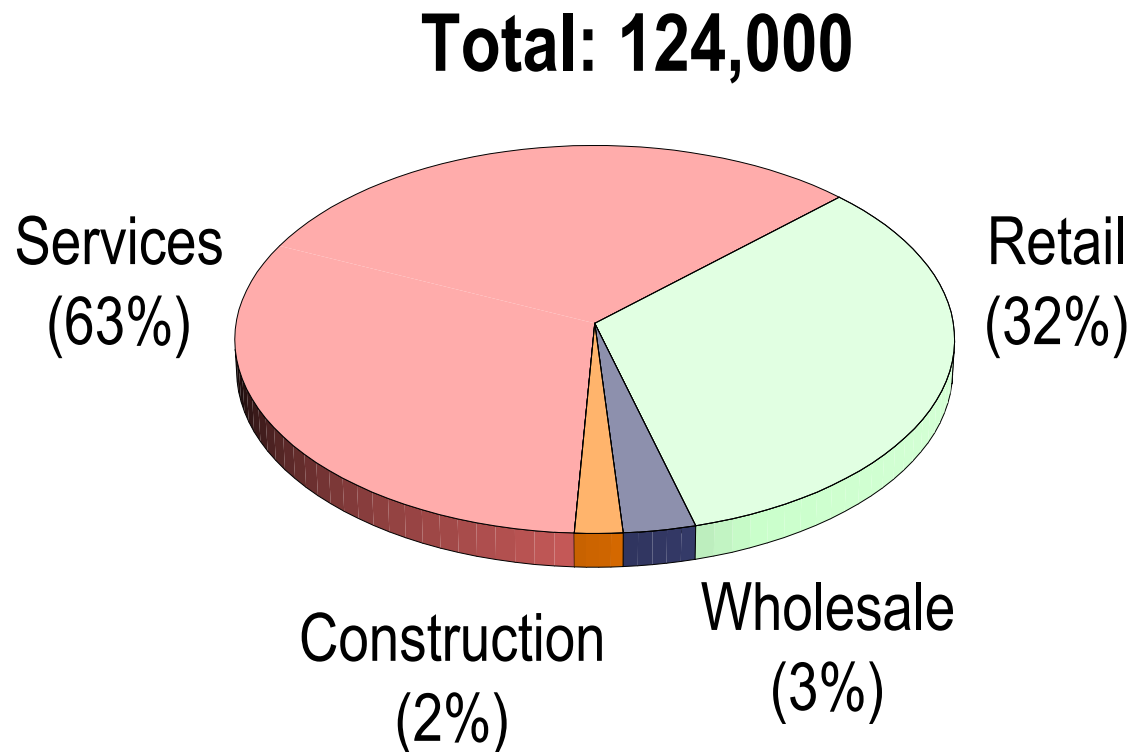
Job Creation by Sector

Trips by Non-Residents

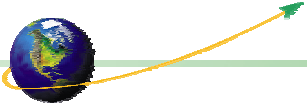


2002 Travel Year

Base: Trips by Non-Residents to Maine



Tax Revenues from Tourism Trips by Non-Residents

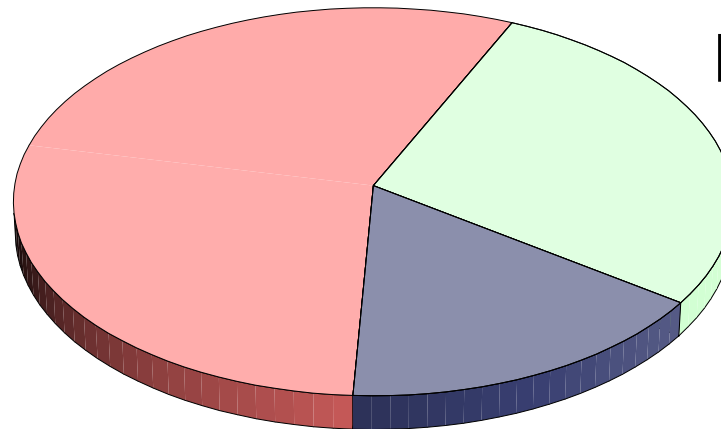


2002 Travel Year

Base: Trips by Non-Residents to Maine

Total: \$376.9 Million

Sales Tax
\$205.6 Million
(55%)

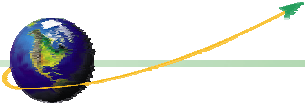


Personal Income Tax
\$105.5 Million
(28%)

Gasoline Tax
\$65.8 Million
(17%)

Overnight Marketable Trip Profile

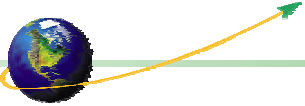
Overnight Marketable Trip Profile



2002 Travel Year

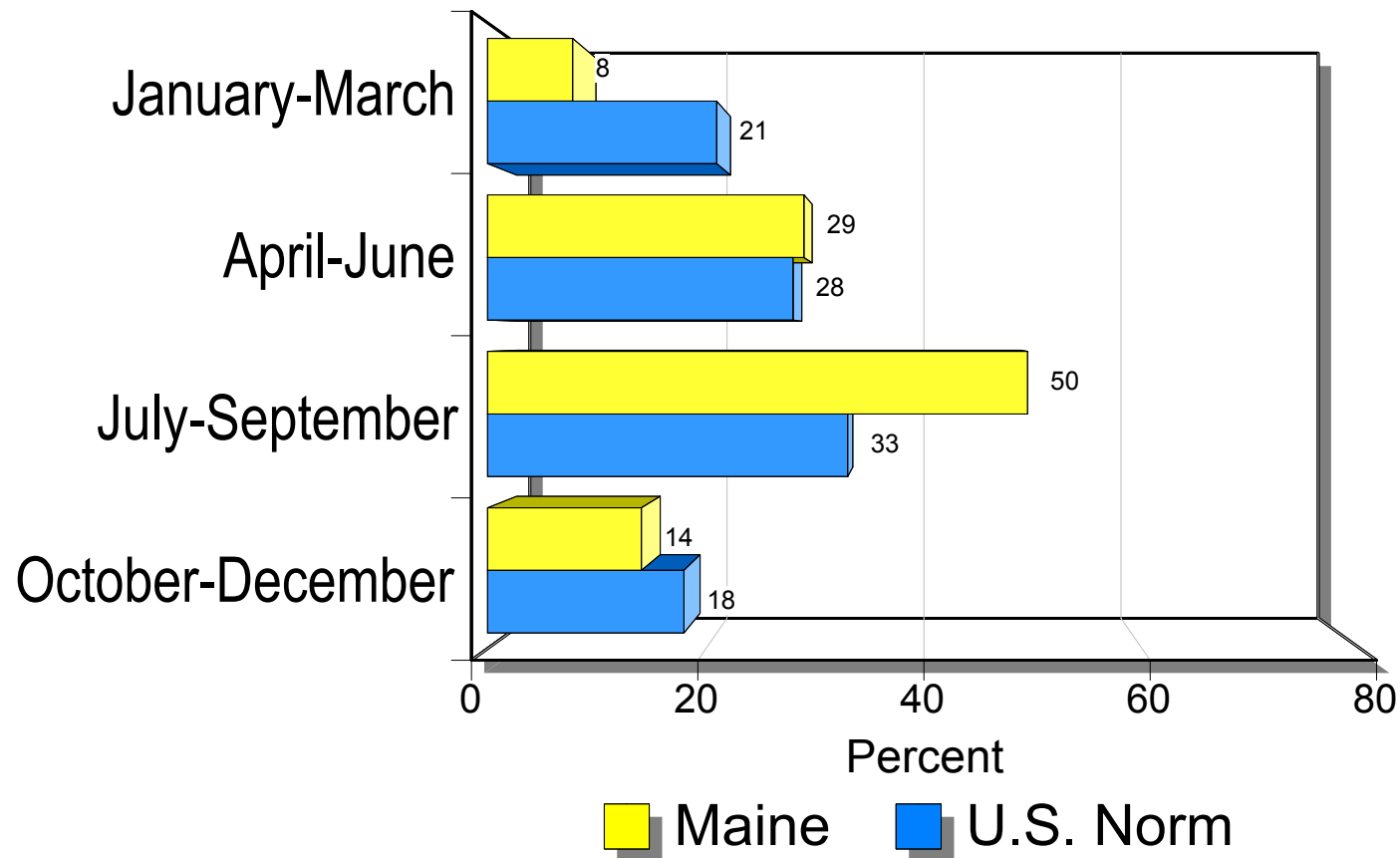
- ⦿ This section of the report profiles *Overnight Marketable Trips* to Maine and draws comparisons to the U.S. Norm for such trips.
- ⦿ Maine's Marketable Trip profile has remained fairly stable over the past few years, including the importance of the summer travel period:
 - ⦿ *half of all overnight trips occur in July, August, and September.*

Season of Trip

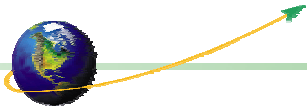


2002 Travel Year

Base: Overnight Marketable Trips

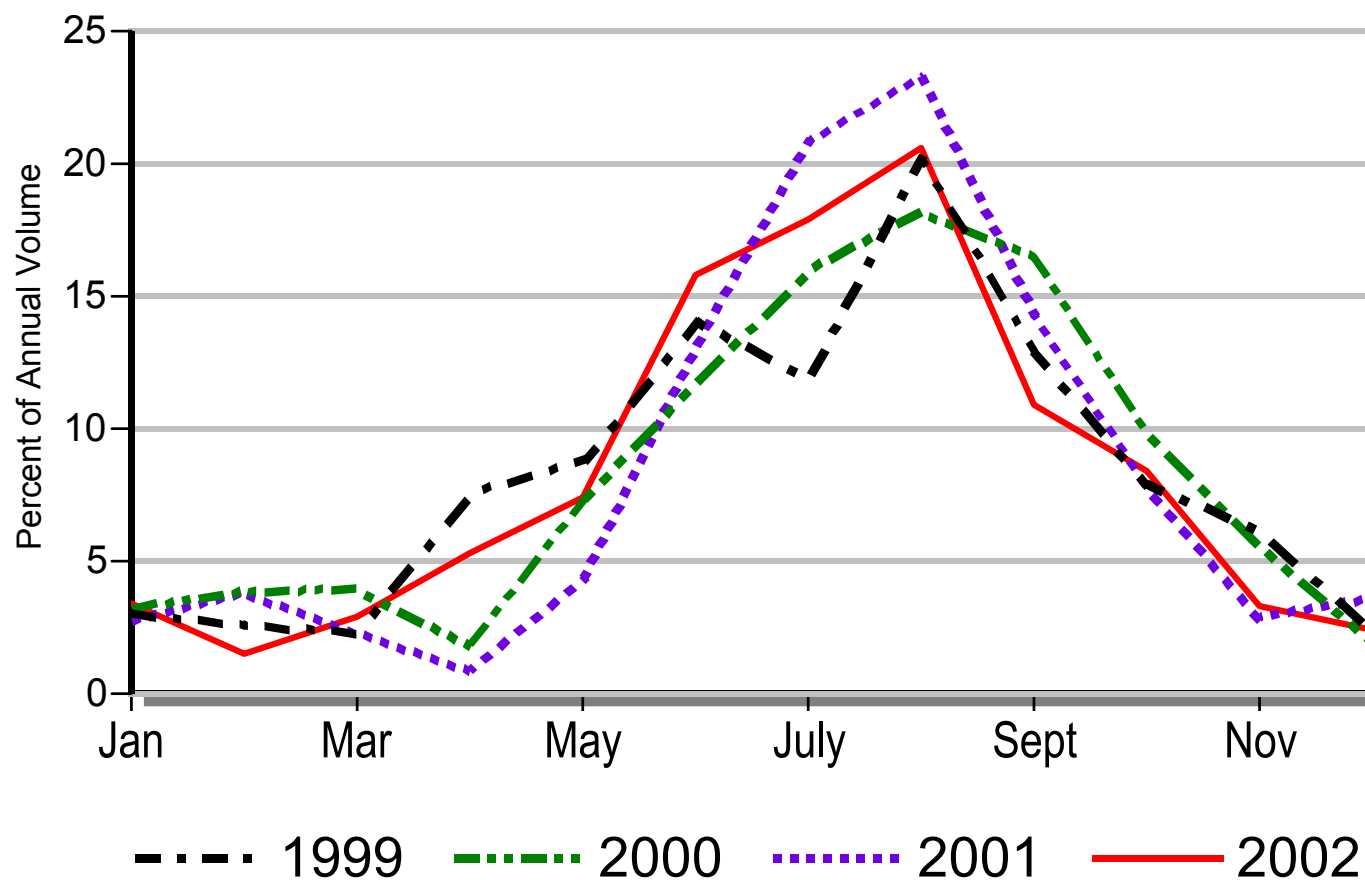


Month of Marketable Trips 1999 – 2002

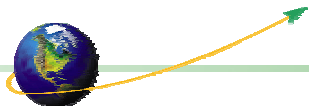


2002 Travel Year

Base: Overnight Marketable Trips



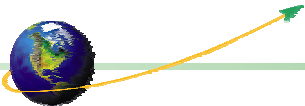
Sources of Business



2002 Travel Year

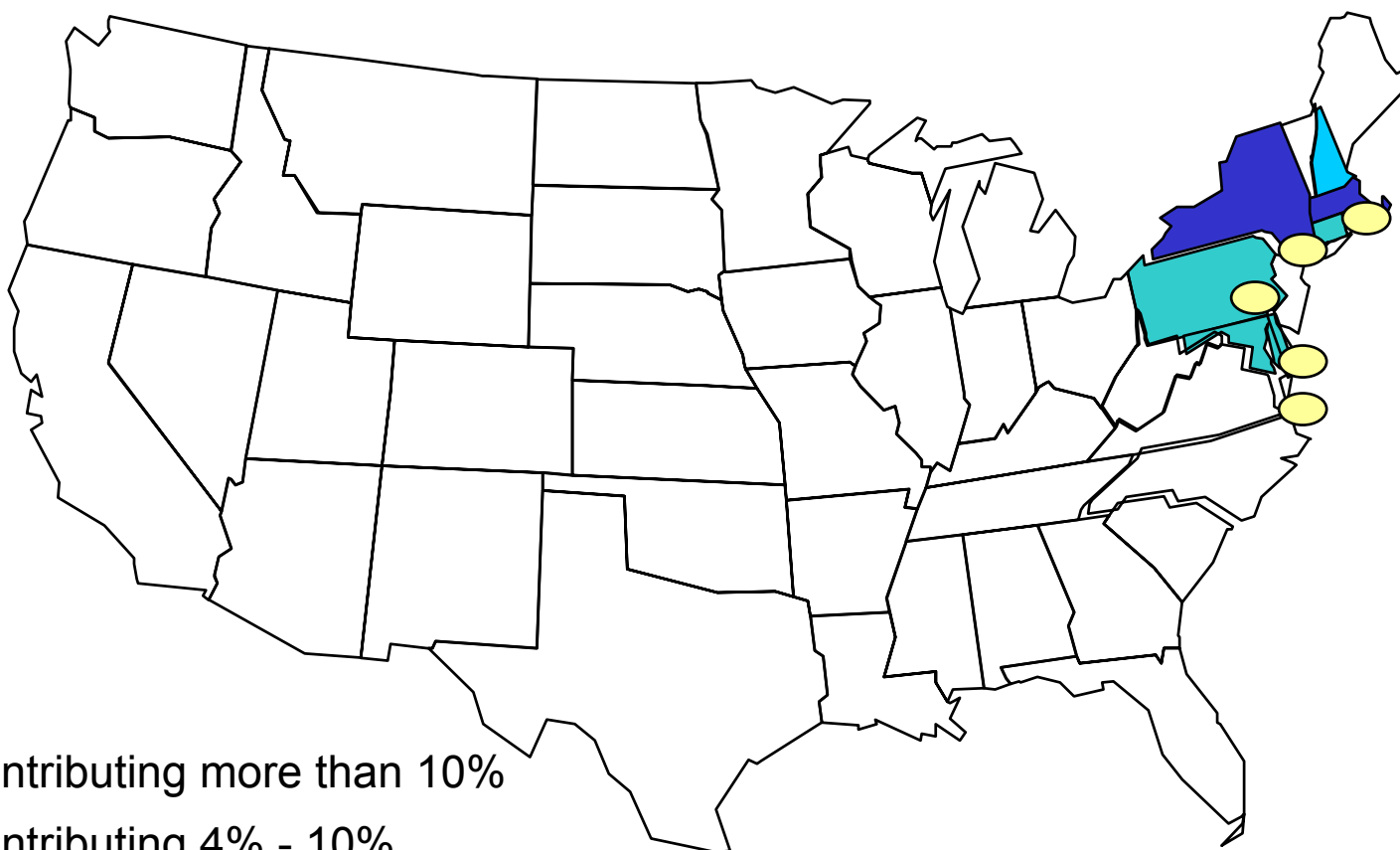
- ⊙ Massachusetts was the most important source of non-resident overnight trips to Maine.
 - ⊙ *Massachusetts accounted for 29% of non-residents' overnight Marketable trips and Boston itself for 28%.*
 - ⊙ *The percentage of trips sourced from some DMA's (including those of Boston and New York City) may exceed the percentage sourced from the city's state because the DMA boundaries include some counties of adjoining states.*
 - ⊙ *After Massachusetts, followed the states of New York (11%), New Hampshire (9%), Connecticut (7%) and Pennsylvania (6%).*

Sources Of Business from Out-of-State



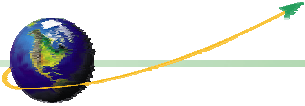
2002 Travel Year

Base: Overnight Marketable Trips from Out-of-State



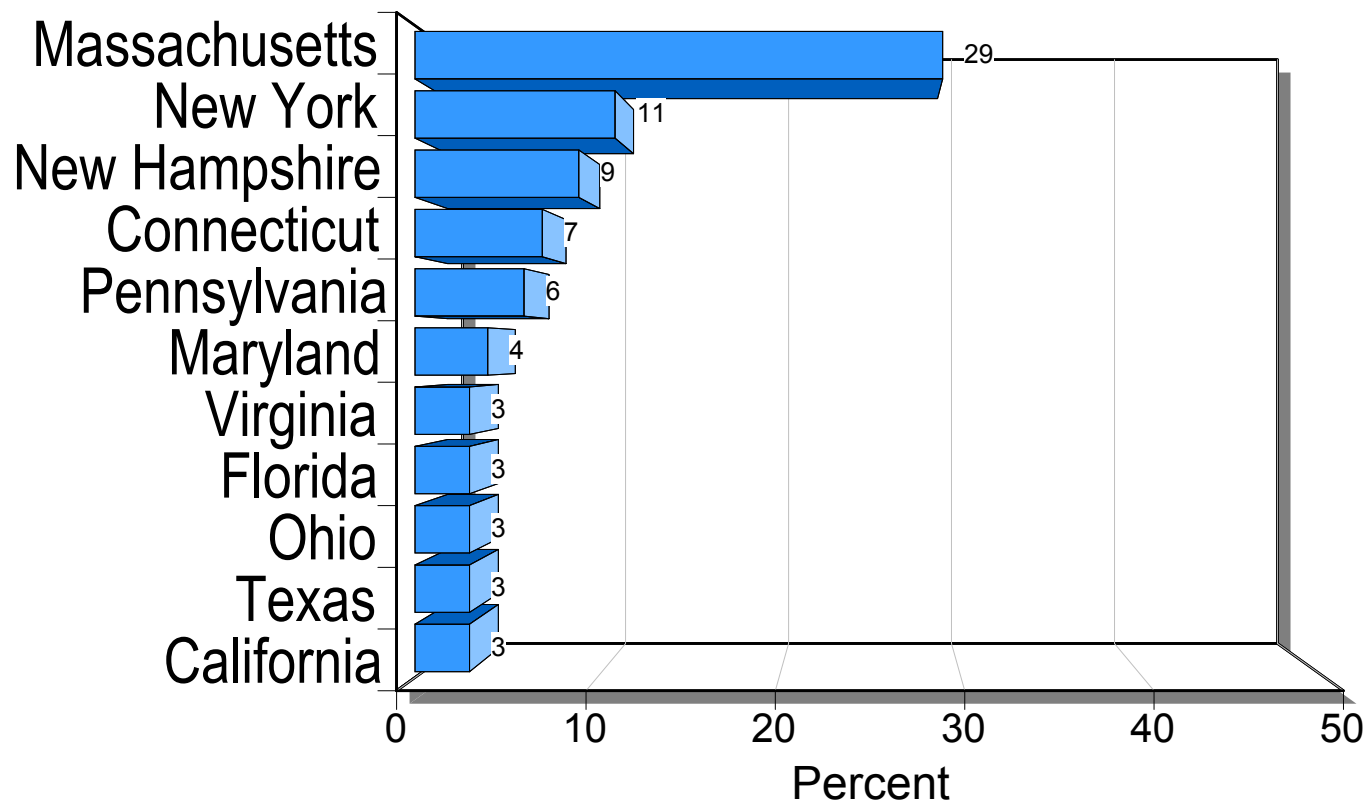
- States contributing more than 10%
- States contributing 4% - 10%
- DMAs contributing more than 4%

State Sources of Overnight Trips From Out-of-State

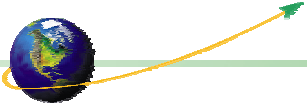


2002 Travel Year

Base: Overnight Marketable Trips from Out-of-State

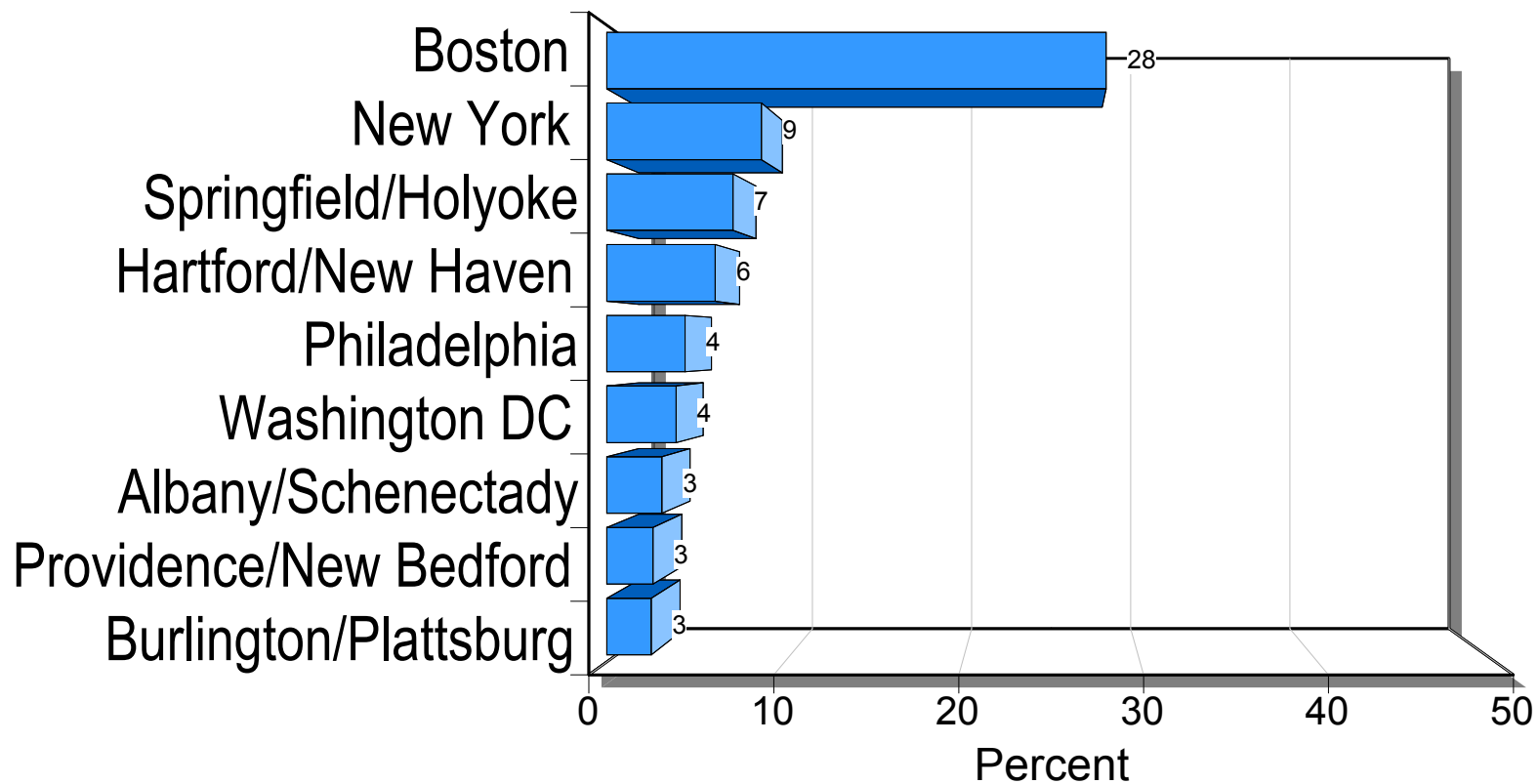


Urban Sources Of Overnight Trips from Out-of-State*



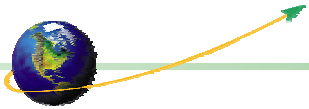
2002 Travel Year

Base: Overnight Marketable Trips from Out-of-State



* DMA of residence

Demographics



2002 Travel Year

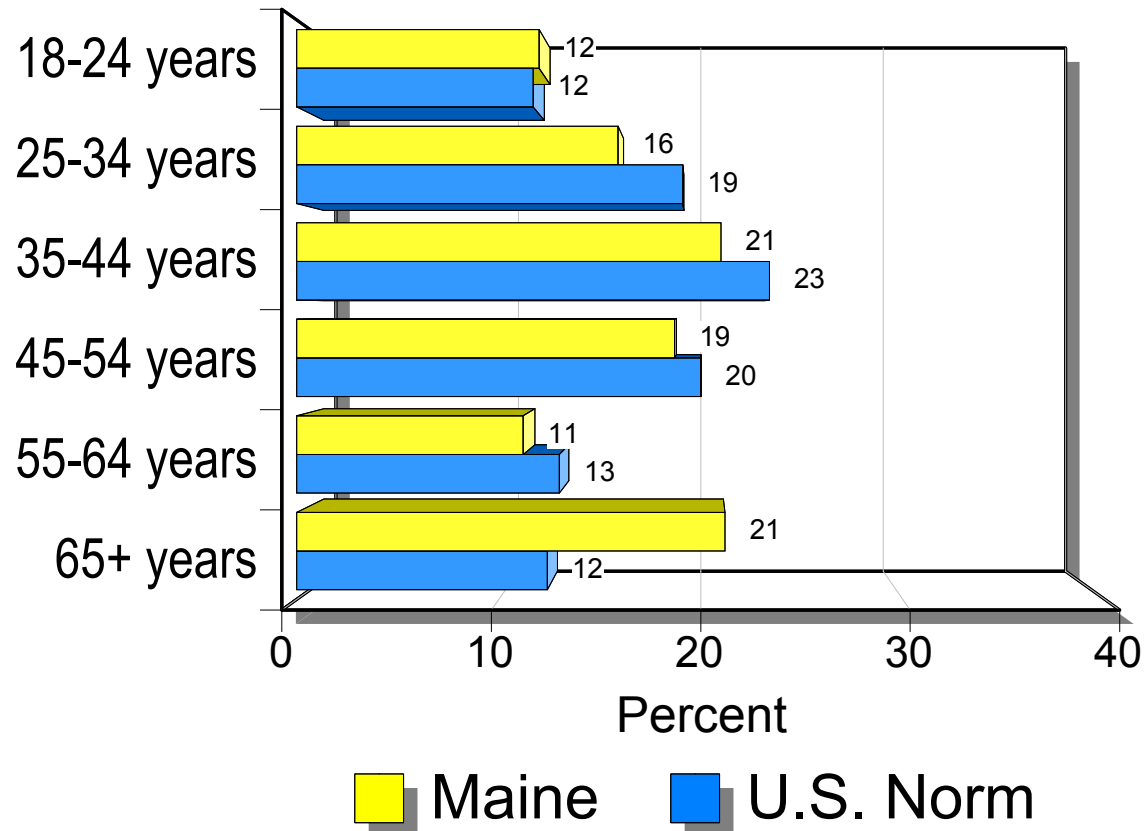
- The demographic profile of the average overnight traveler to Maine was similar to the average U.S. traveler but for being:
 - *somewhat older.*
 - *46.5 years of age on average versus the U.S. Norm of 44.2*
 - *21% were 65+ years of age versus the U.S. Norm of 12%.*

Age



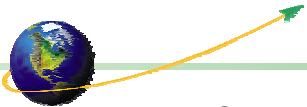
2002 Travel Year

Base: Overnight Marketable Trips



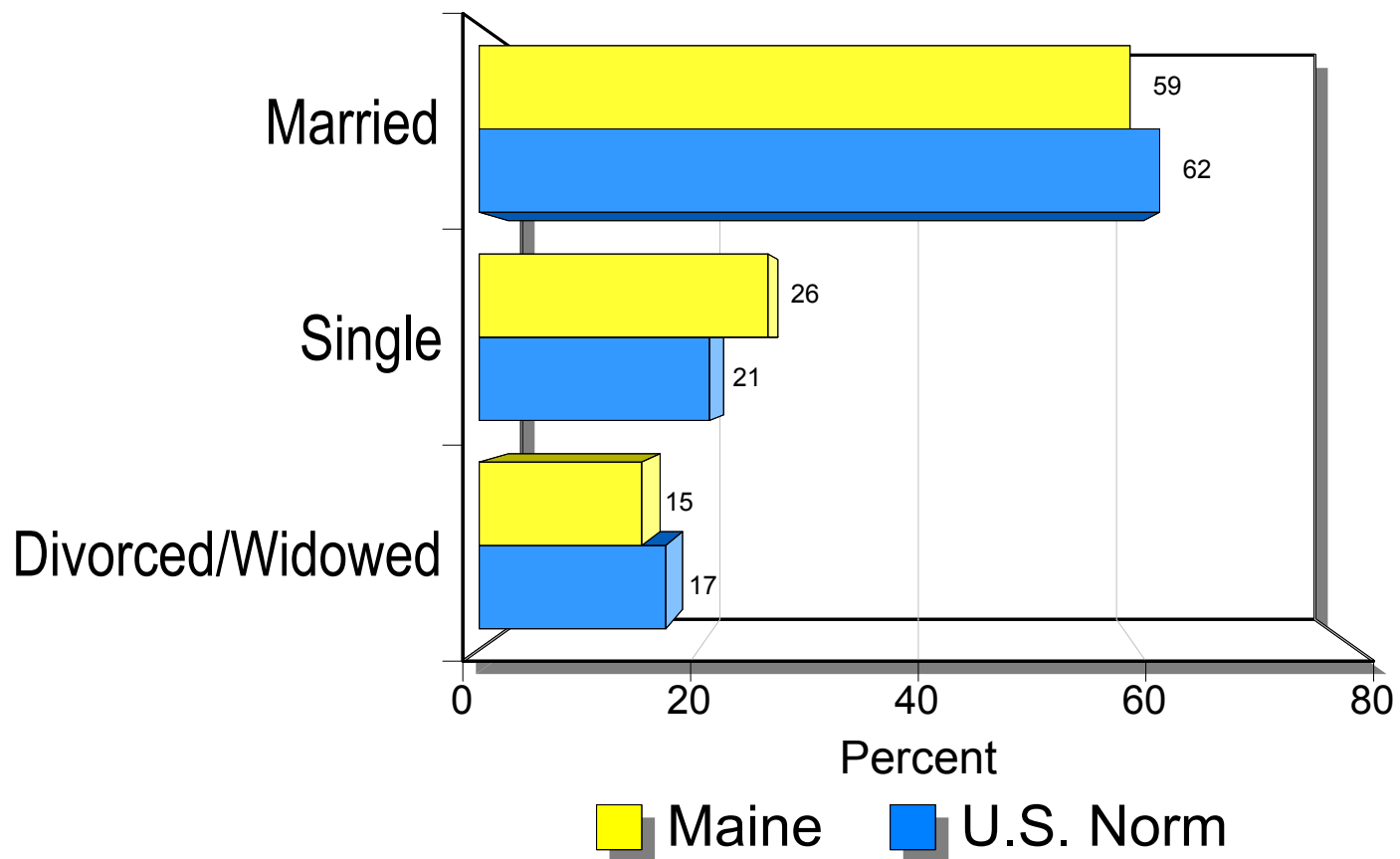
	<u>Maine</u>	<u>U.S. Norm</u>
Average Age	46.5	44.2

Marital Status



2002 Travel Year

Base: Overnight Marketable Trips

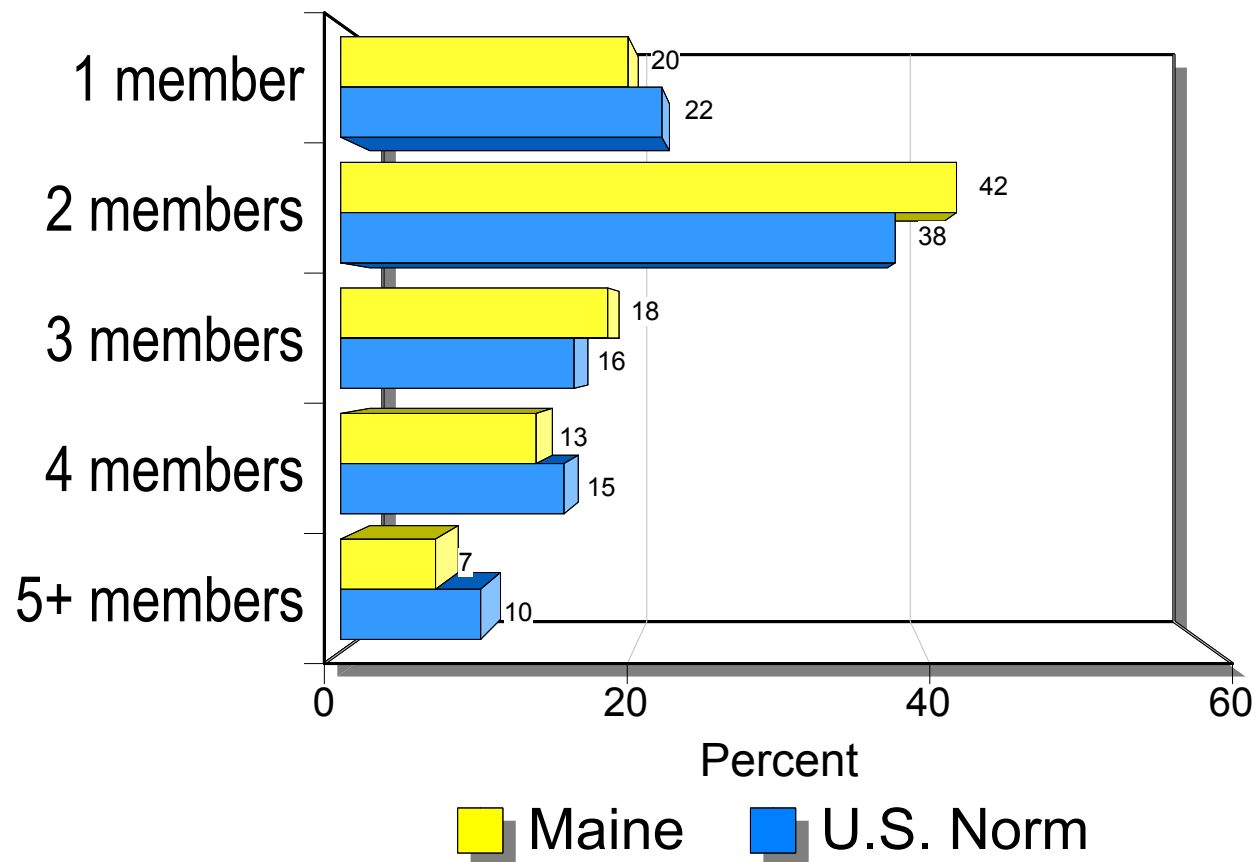


Household Size



2002 Travel Year

Base: Overnight Marketable Trips

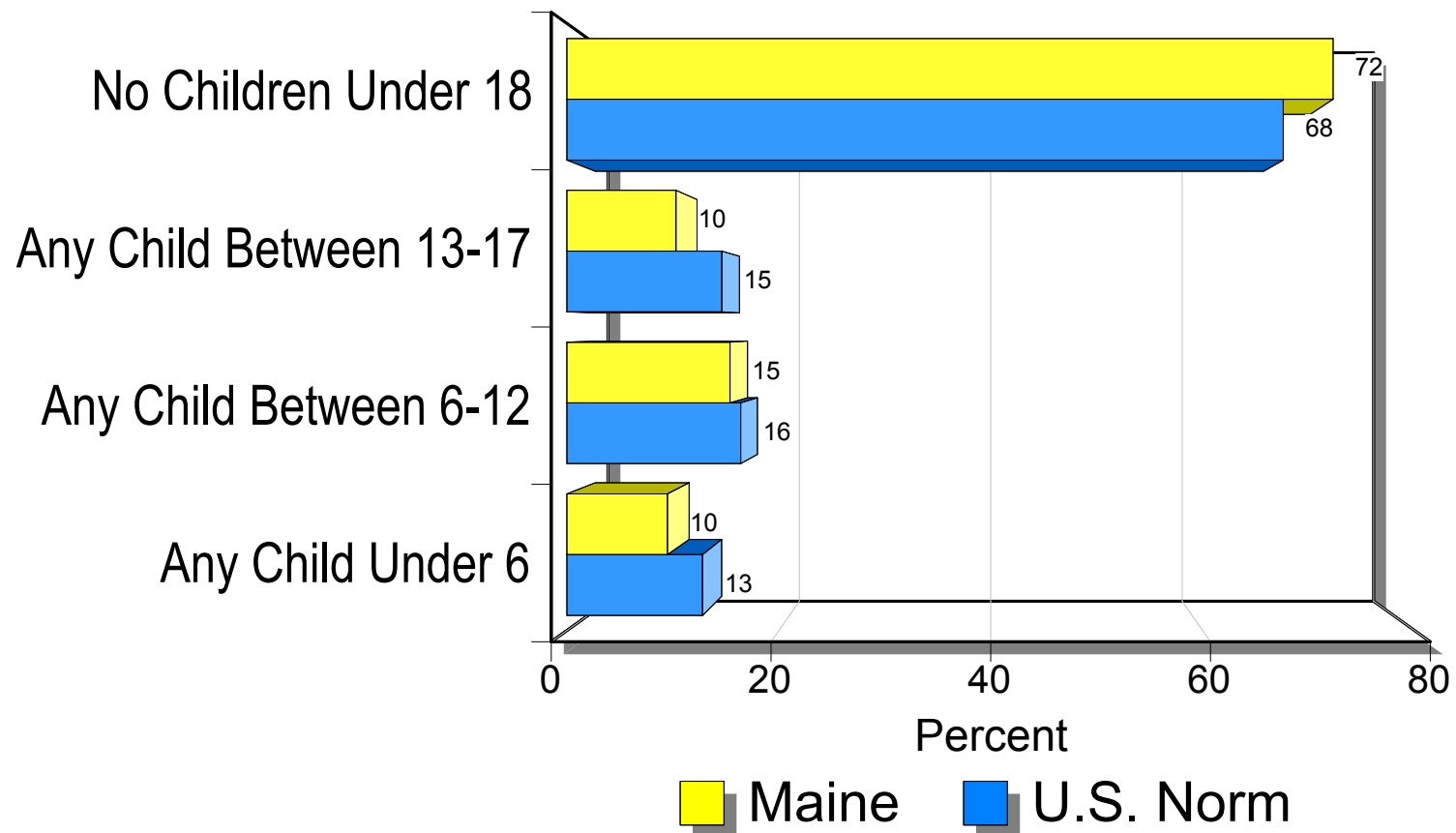


Children in Household

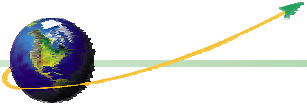


2002 Travel Year

Base: Overnight Marketable Trips

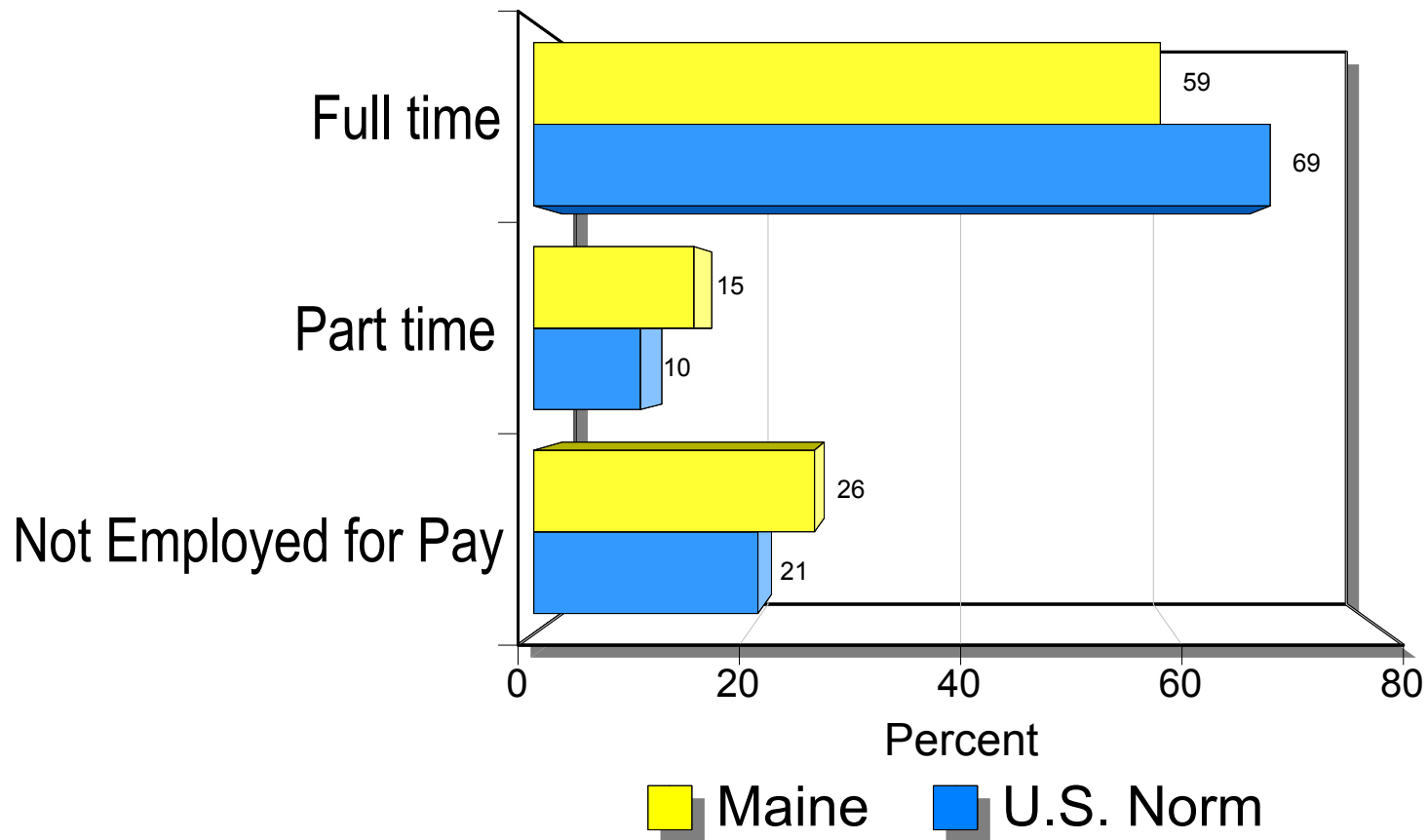


Employment

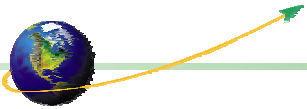


2002 Travel Year

Base: Overnight Marketable Trips

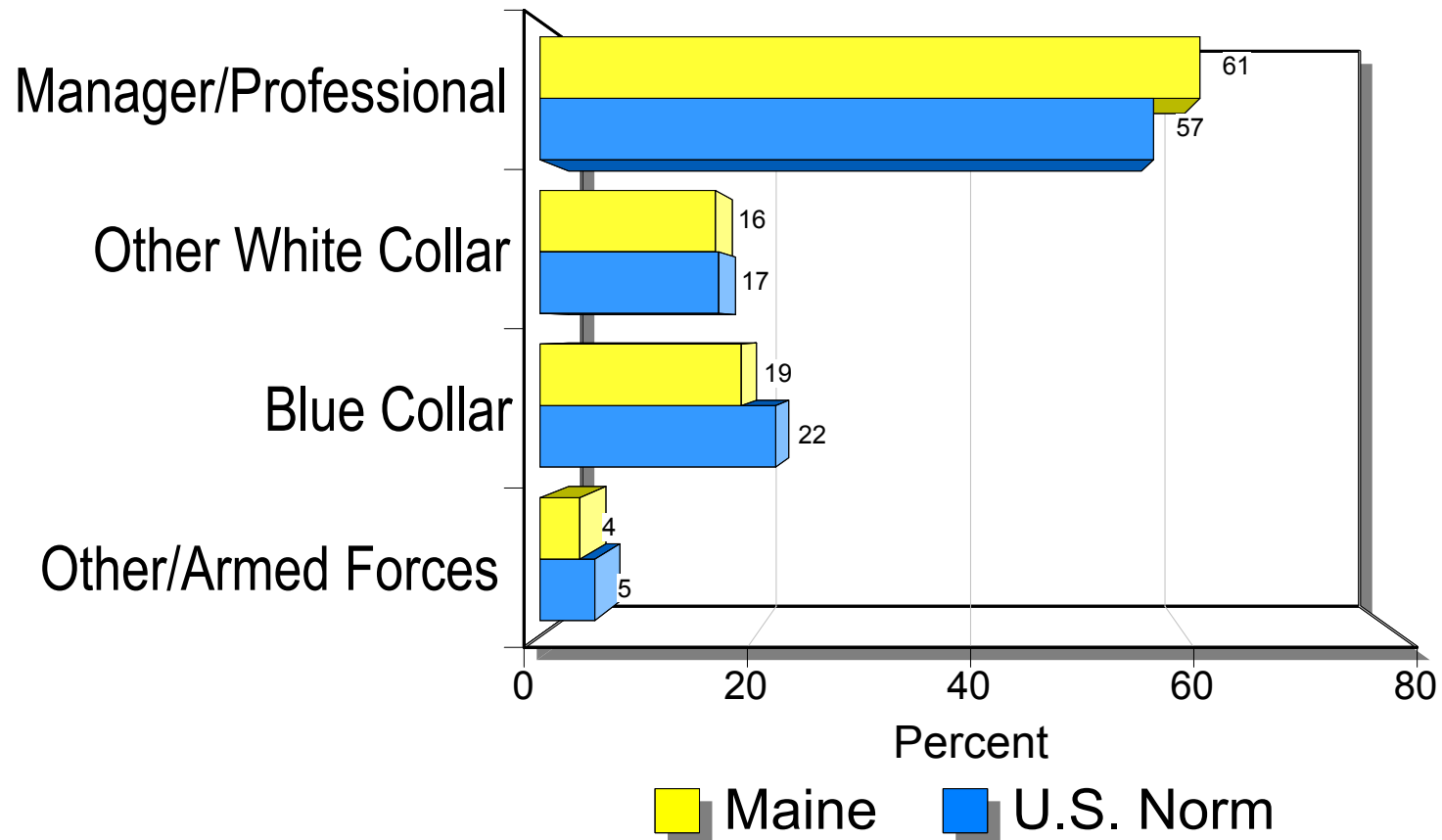


Occupation

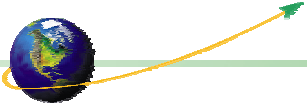


2002 Travel Year

Base: Overnight Marketable Trips by Those Employed

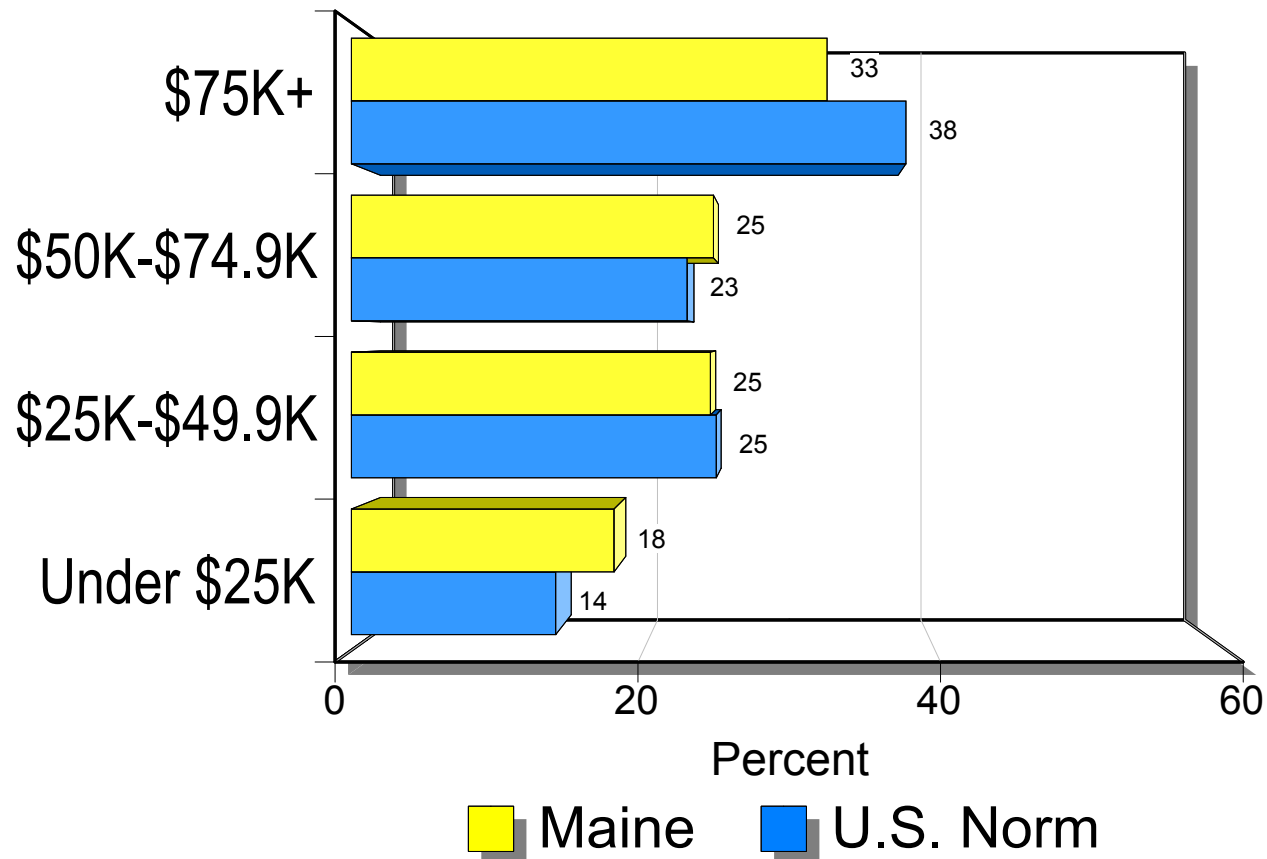


Income

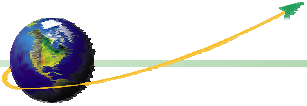


2002 Travel Year

Base: Overnight Marketable Trips

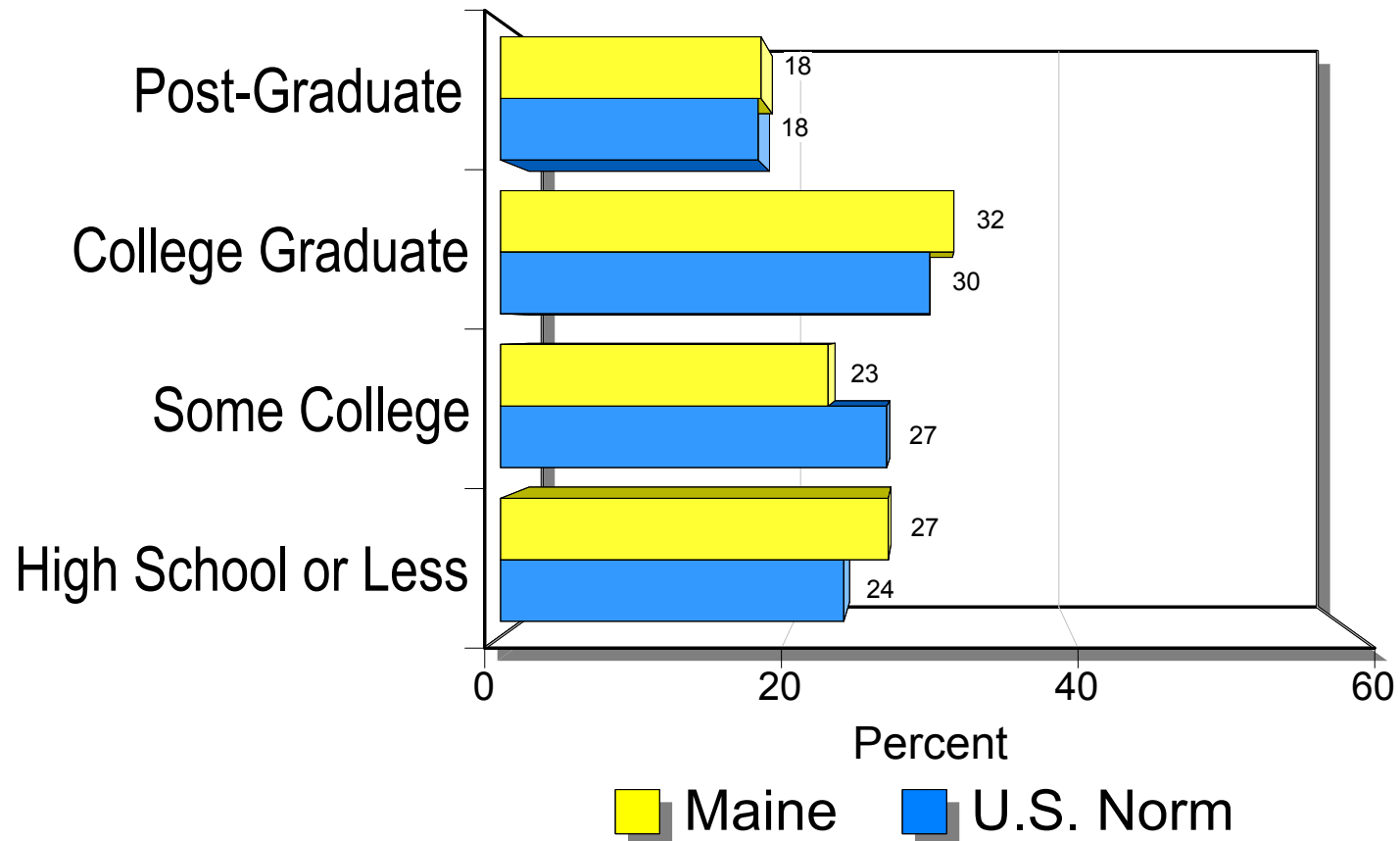


Education

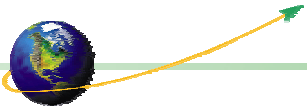


2002 Travel Year

Base: Overnight Marketable Trips



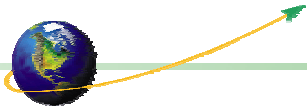
Travel Planning and Booking



2002 Travel Year

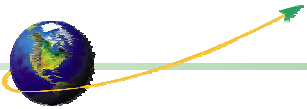
- ⊙ Maine's overnight visitors planned and booked further ahead than the U.S. Norm, using a variety of information sources:
 - ⊙ *the internet more often than any other single source including the advice of friends and relatives;*
 - ⊙ *auto clubs, visitor bureaus, and books more commonly than the U.S. Norm.*
- ⊙ Three-quarters of the trips were booked ahead in whole or part and,
 - ⊙ *over the internet (32%) rather than through a travel agent (10%); the latter being below the U.S. Norm (14%) as well.*

The Internet



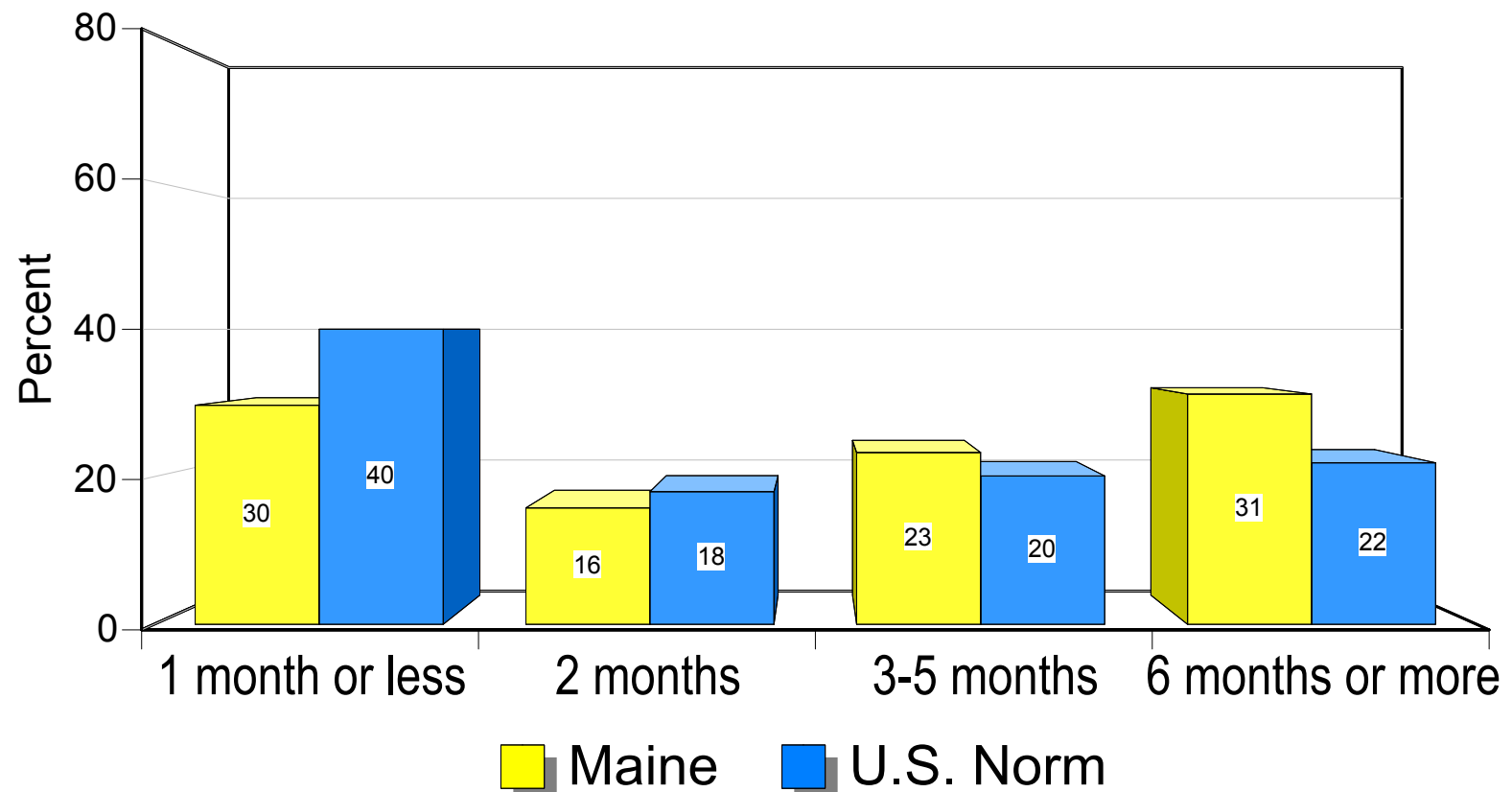
- ◉ The internet has become the single-most common source of information for travel planning (*other than personal experience*) both nationally and for Maine trips.
 - ◉ *Nationally, its use grew from 7% in 1997 to 18% in 1999, and is now up to 38%.*
 - ◉ *For Maine trips, use grew from 12% in 1997 to 21% in 1999, and is now 35%.*
- ◉ The *visitmaine.com* and/or the *maineattraction.com* websites were used to plan 20% of Maine trips.
 - ◉ *For 12%, they were used to help obtain more information about a destination already decided upon.*
 - ◉ *For 8%, they were used to help choose which destination to visit --- whether an area of the country, a state(s), and/or a destination(s) within a state.*

Planning Cycle

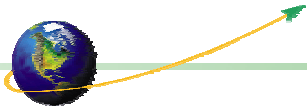


2002 Travel Year

Base: Overnight Marketable Trips

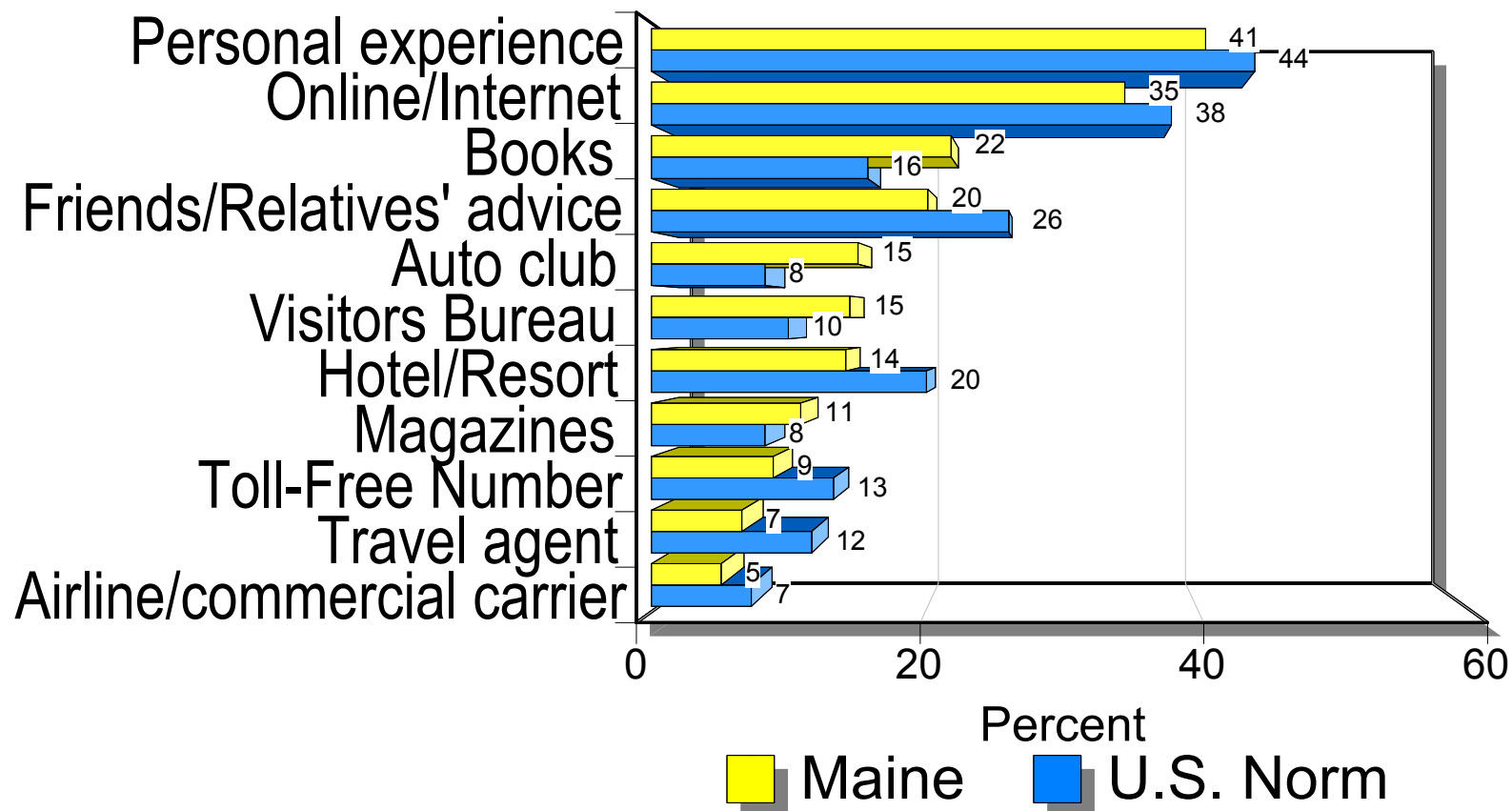


Information Sources Used for Planning

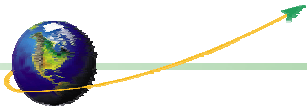


2002 Travel Year

Base: Overnight Marketable Trips

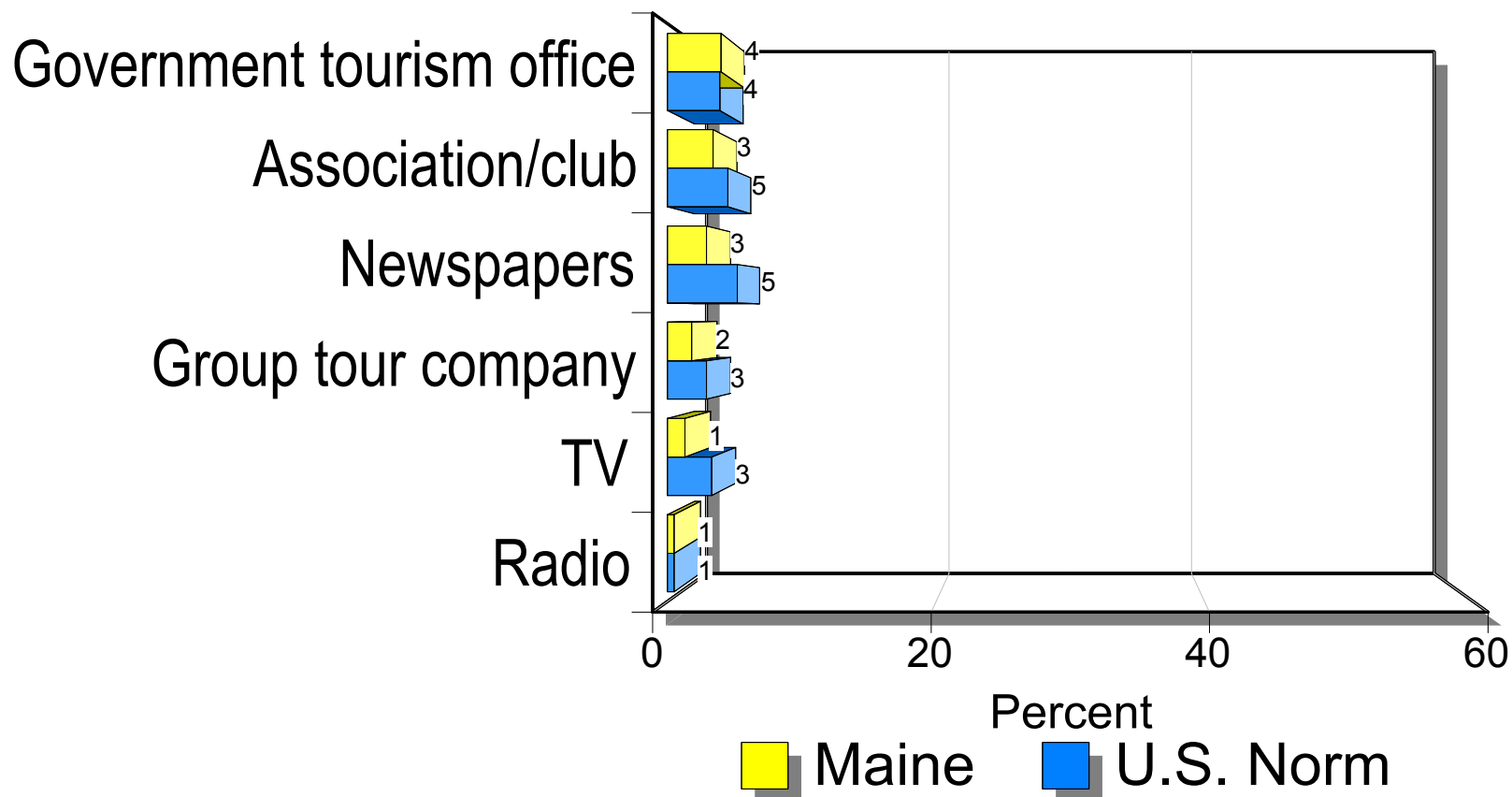


Information Sources Used for Planning cont'd

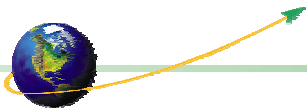


2002 Travel Year

Base: Overnight Marketable Trips

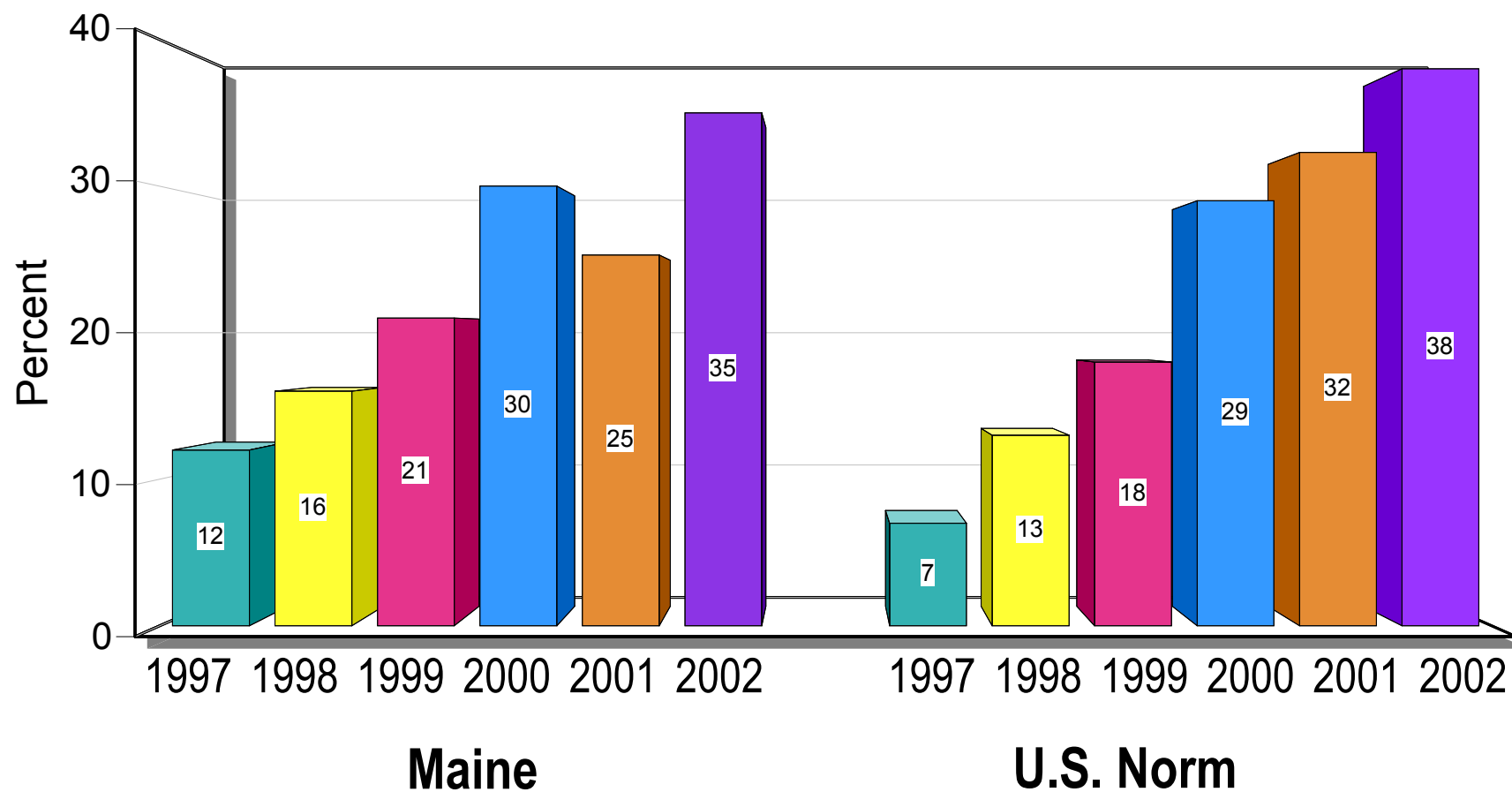


Use of the Internet for Trip Planning

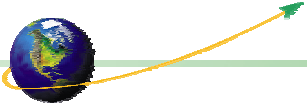


2002 Travel Year

Base: Overnight Marketable Trips

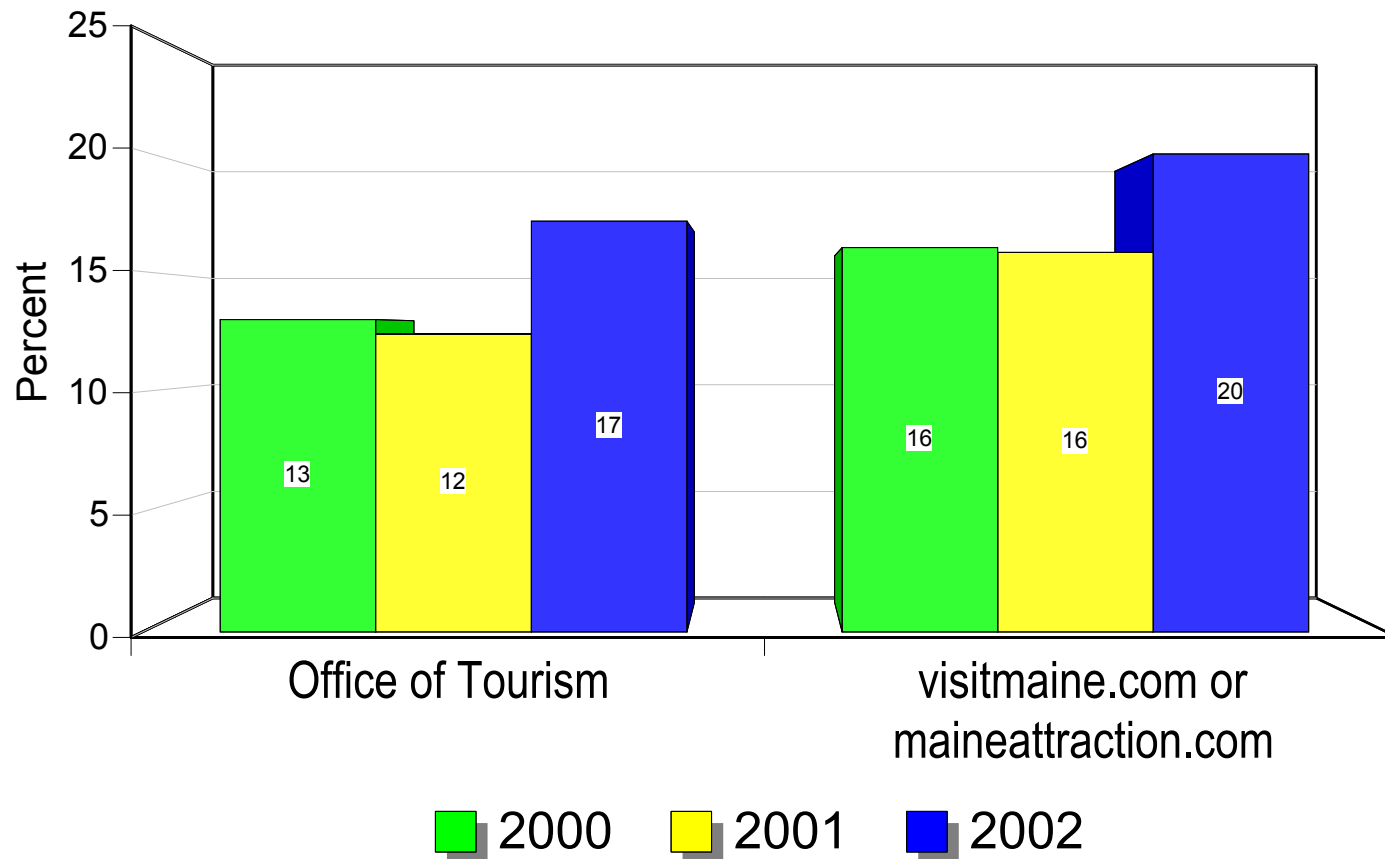


Use of Information Services for Planning

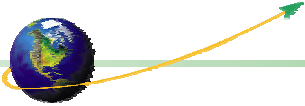


2002 Travel Year

Base: Overnight Marketable Trips

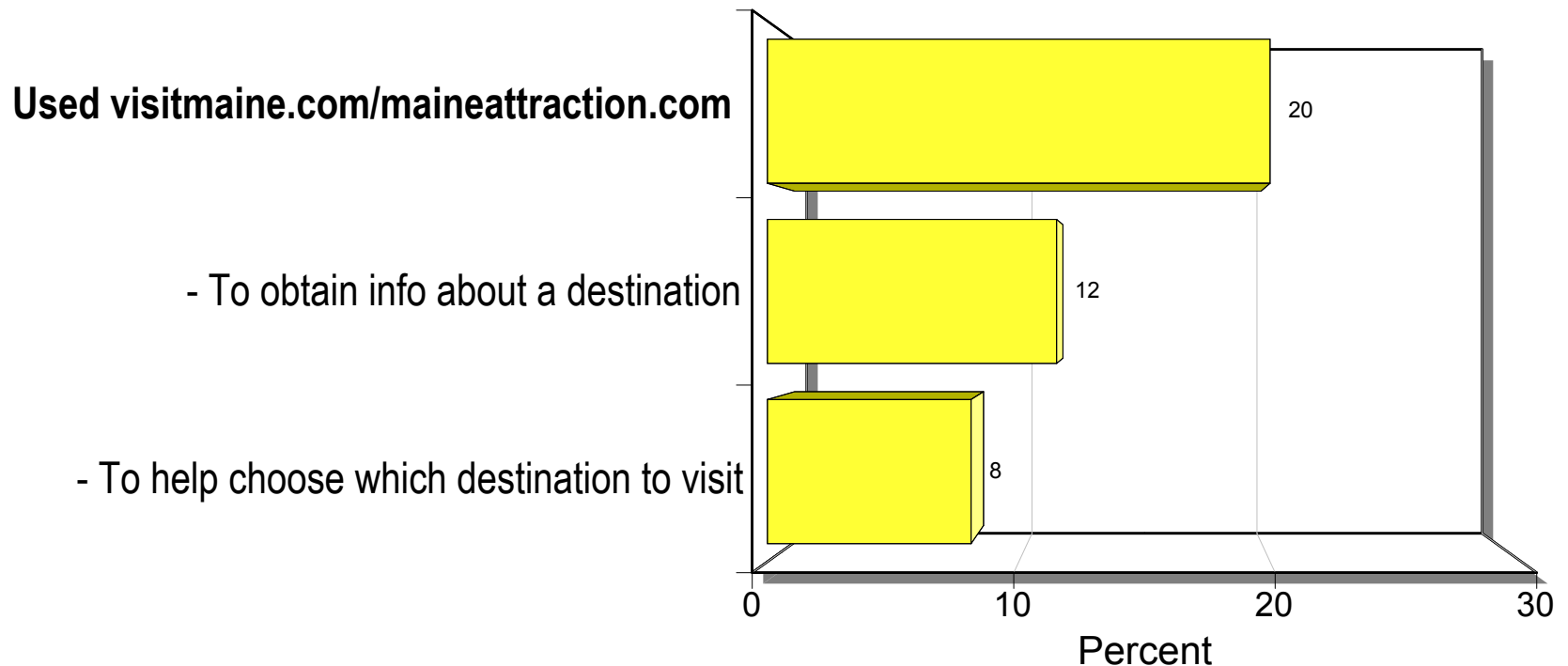


Reason for Using Destination Website

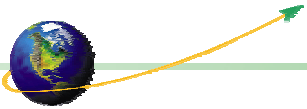


2002 Travel Year

Base: Overnight Marketable Trips

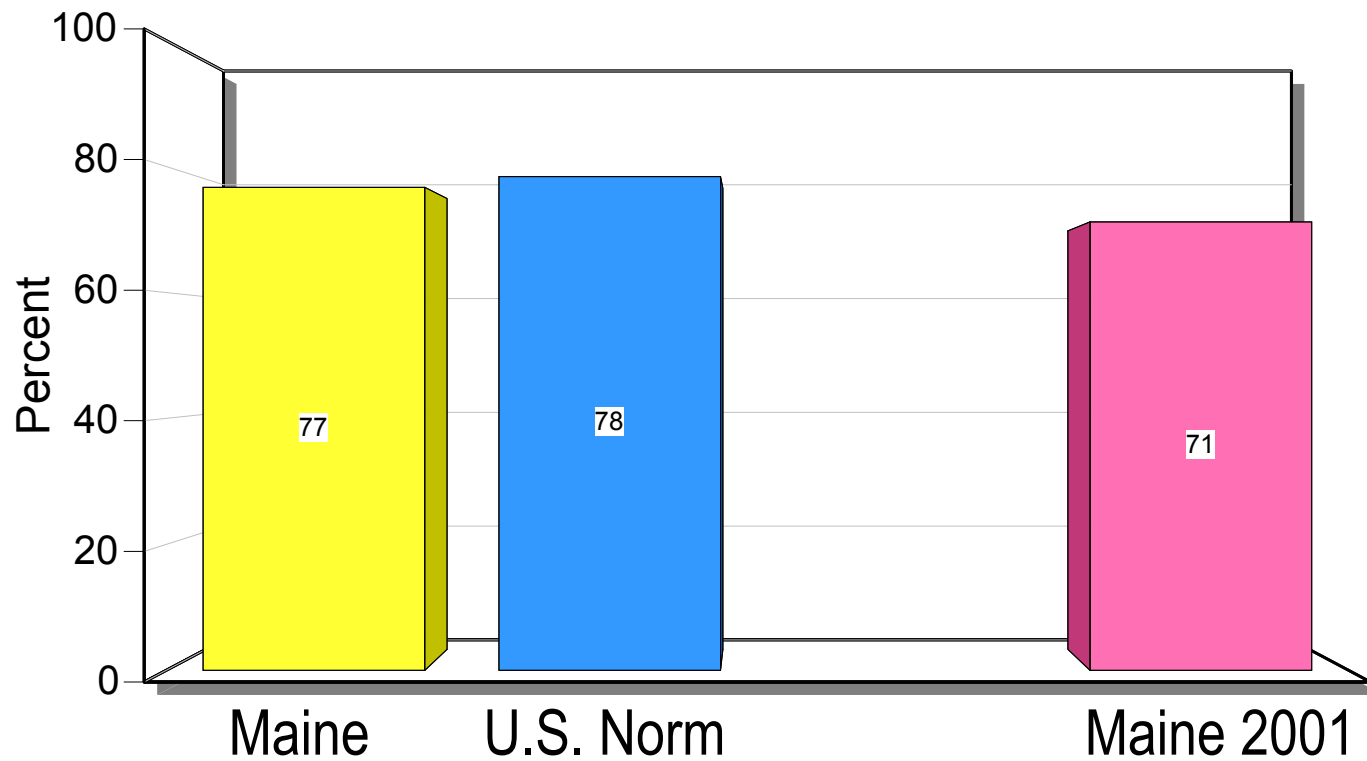


Percent Who Booked In Advance

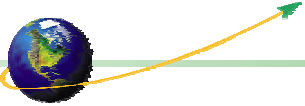


2002 Travel Year

Base: Overnight Marketable Trips

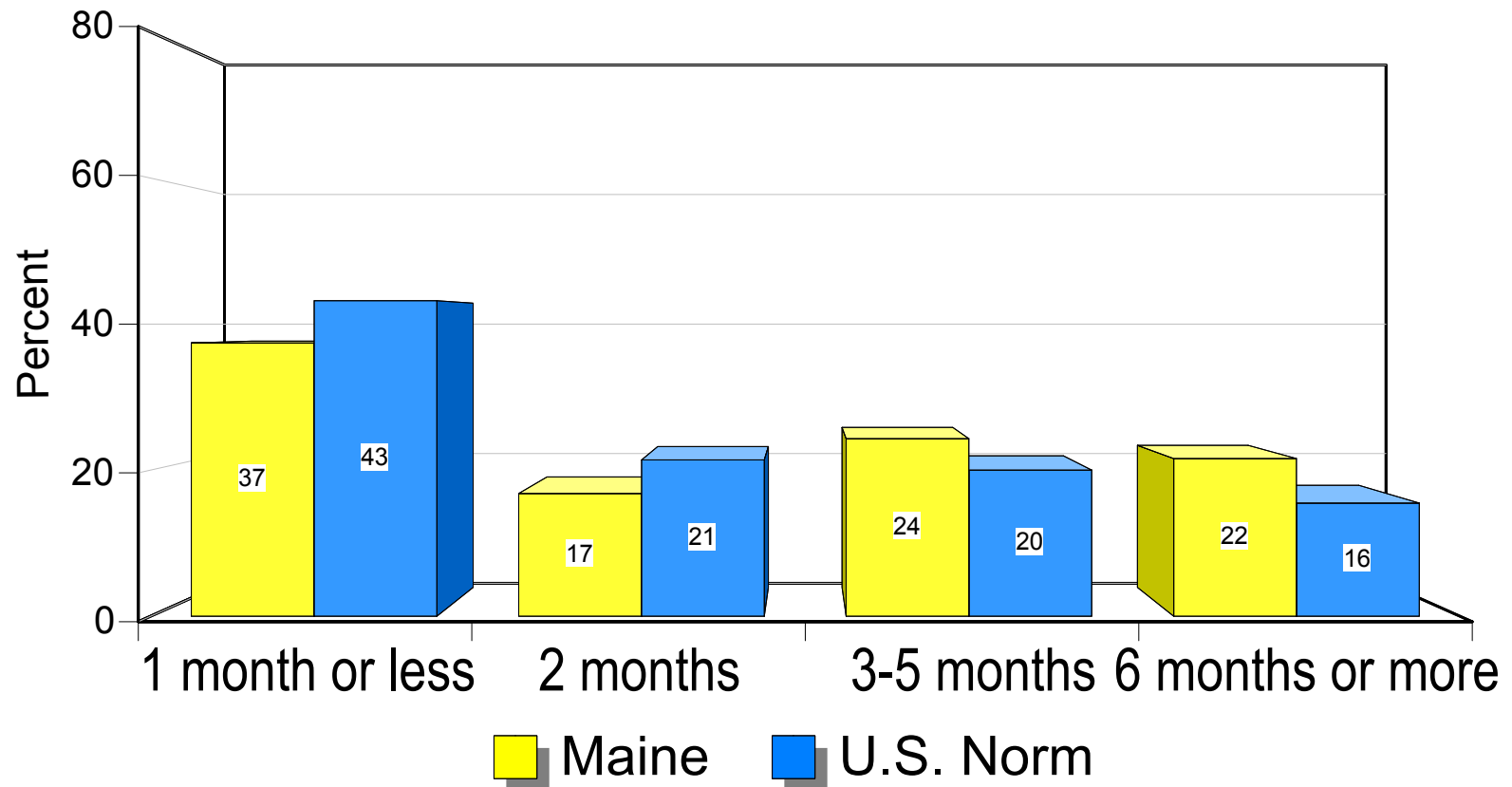


Booking Cycle

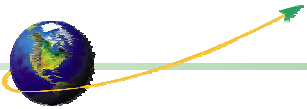


2002 Travel Year

Base: Overnight Marketable Trips Booked in Advance

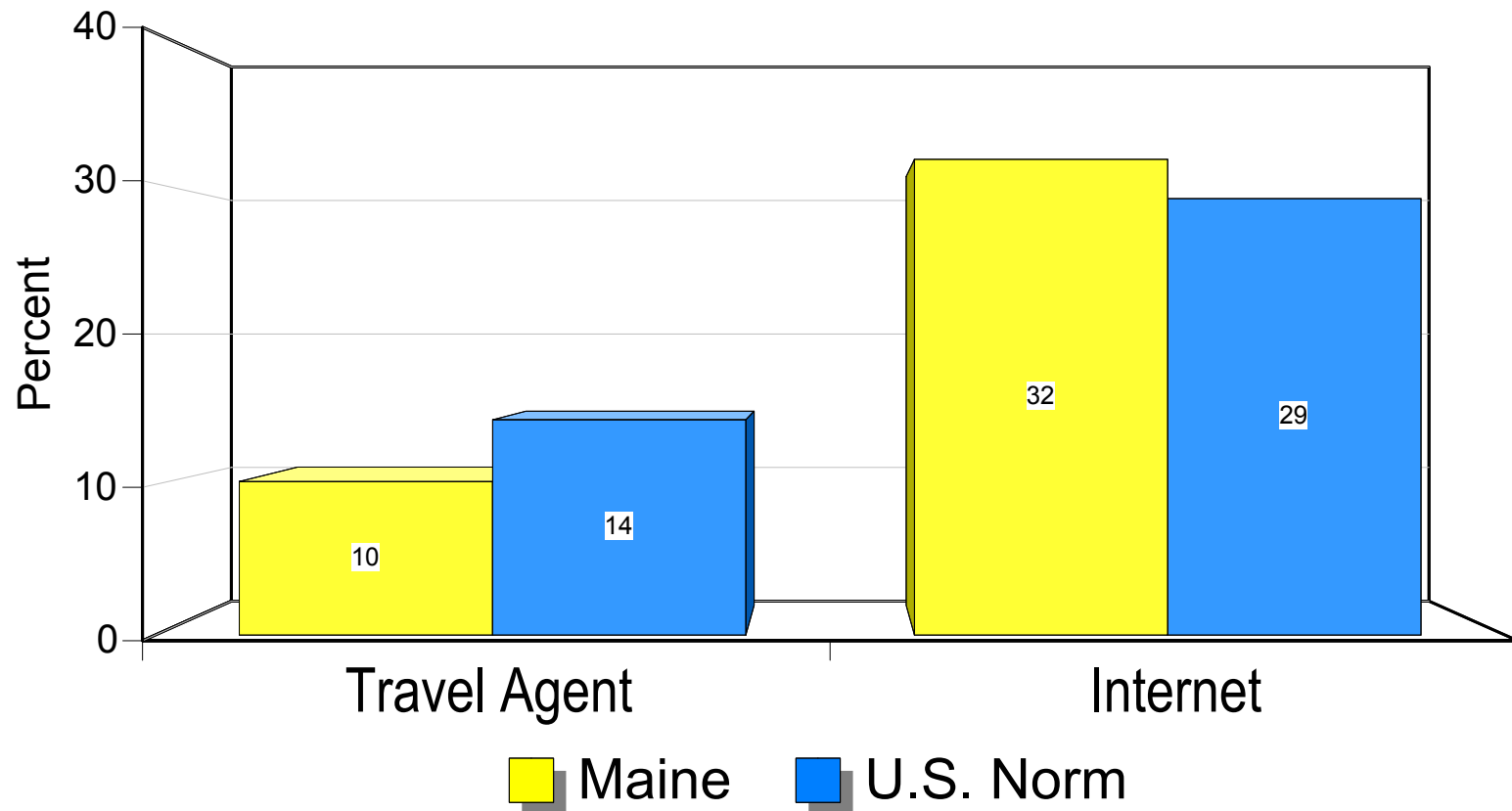


Methods of Booking

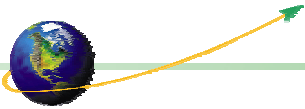


2002 Travel Year

Base: Overnight Marketable Trips Booked in Advance



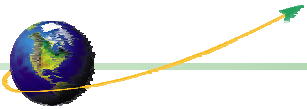
Trip Details



2002 Travel Year

- The average Travel Party size on Maine trips was 3.3 persons, and most often comprised of:
 - spouses (66%),
 - children (31%)
 - *at a level consistent with the 28% of travelers who have children in their households, suggesting that most people who have children travel with them on trips in Maine.*
 - or, friends (28%).
 - Only 4% of people traveled on their own.

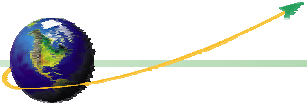
Trip Details cont'd



2002 Travel Year

- ◉ The Maine trips lasted 6.6 nights on average, back up after a dip to 5.5 nights in 2001, and still well beyond the 4.8 night U.S. Norm.
 - ◉ *At either end of the scale were the one-quarter of trips that lasted 1-2 nights versus the four-in-ten that lasted 7+ nights.*
- ◉ The length of stay in Maine was, on average, 4.3 of the 6.6 nights.

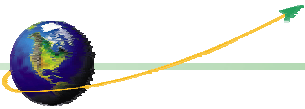
Trip Details cont'd



2002 Travel Year

- ◉ The vast majority of travelers arrived in Maine in their own car (71%).
 - ◉ *Few arrived by plane (6%) versus the U.S. Norm (21%) while,*
 - ◉ *more arrived by ferry/boat (7%) versus the U.S. Norm (2%).*
 - ◉ *Only very minor mention was made by travelers of using more than one mode of transportation to enter the state (3-4%).*

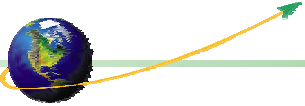
Trip Details cont'd



2002 Travel Year

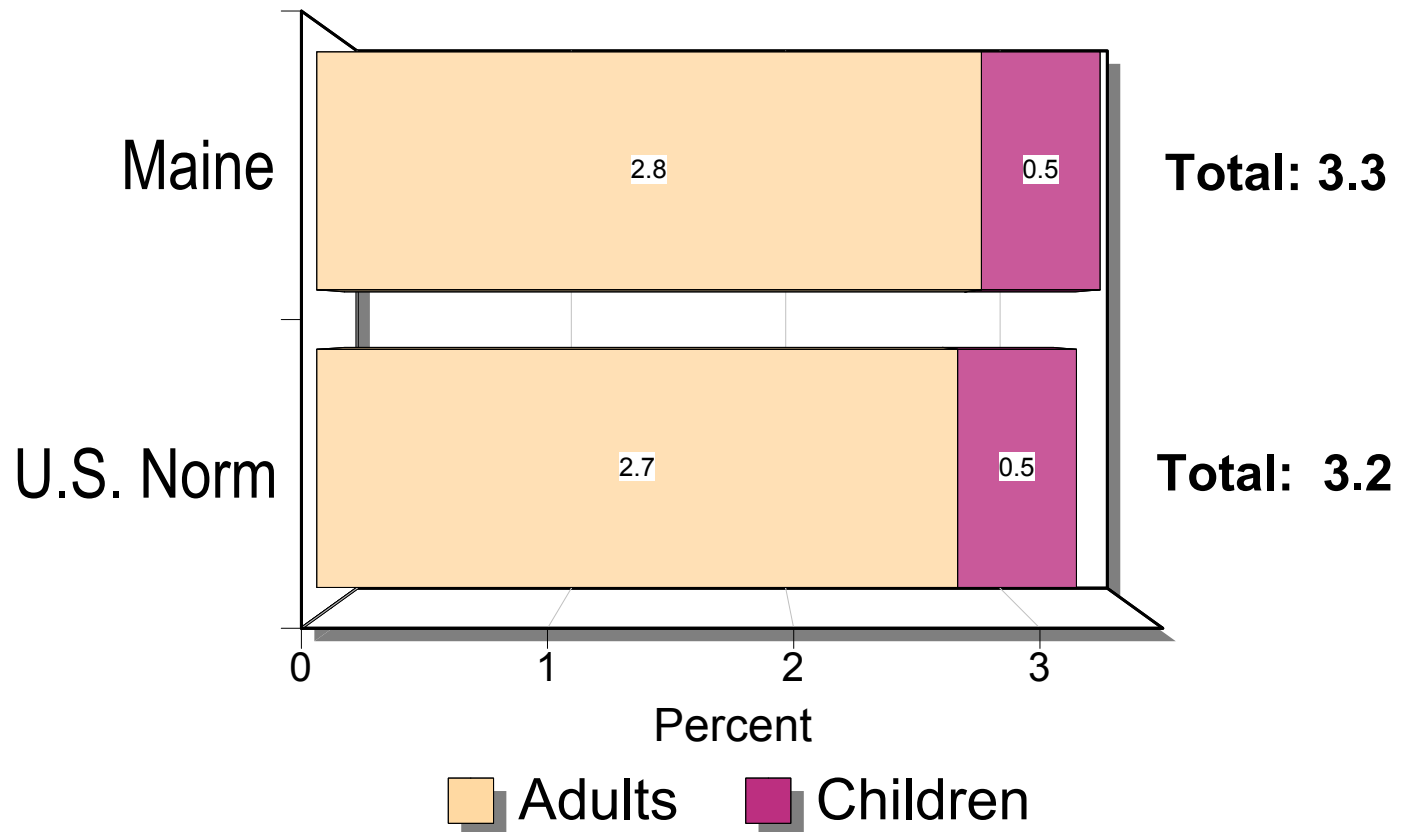
- ◉ Many different types of accommodations were used.
 - ◉ *Motels were the #1 choice, accounting for 22% of nights, well beyond what is typical for U.S. trips (11%).*
 - ◉ *Hotels were next in line (13%), although well behind what is typical for U.S. trips (33%).*
 - ◉ *Rented houses, friends/relatives/own homes, campgrounds, and B&B/Inns followed and with shares typically ahead of U.S. Norm.*

Size of Travel Party

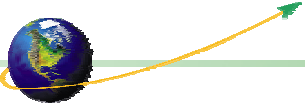


2002 Travel Year

Base: Overnight Marketable Trips

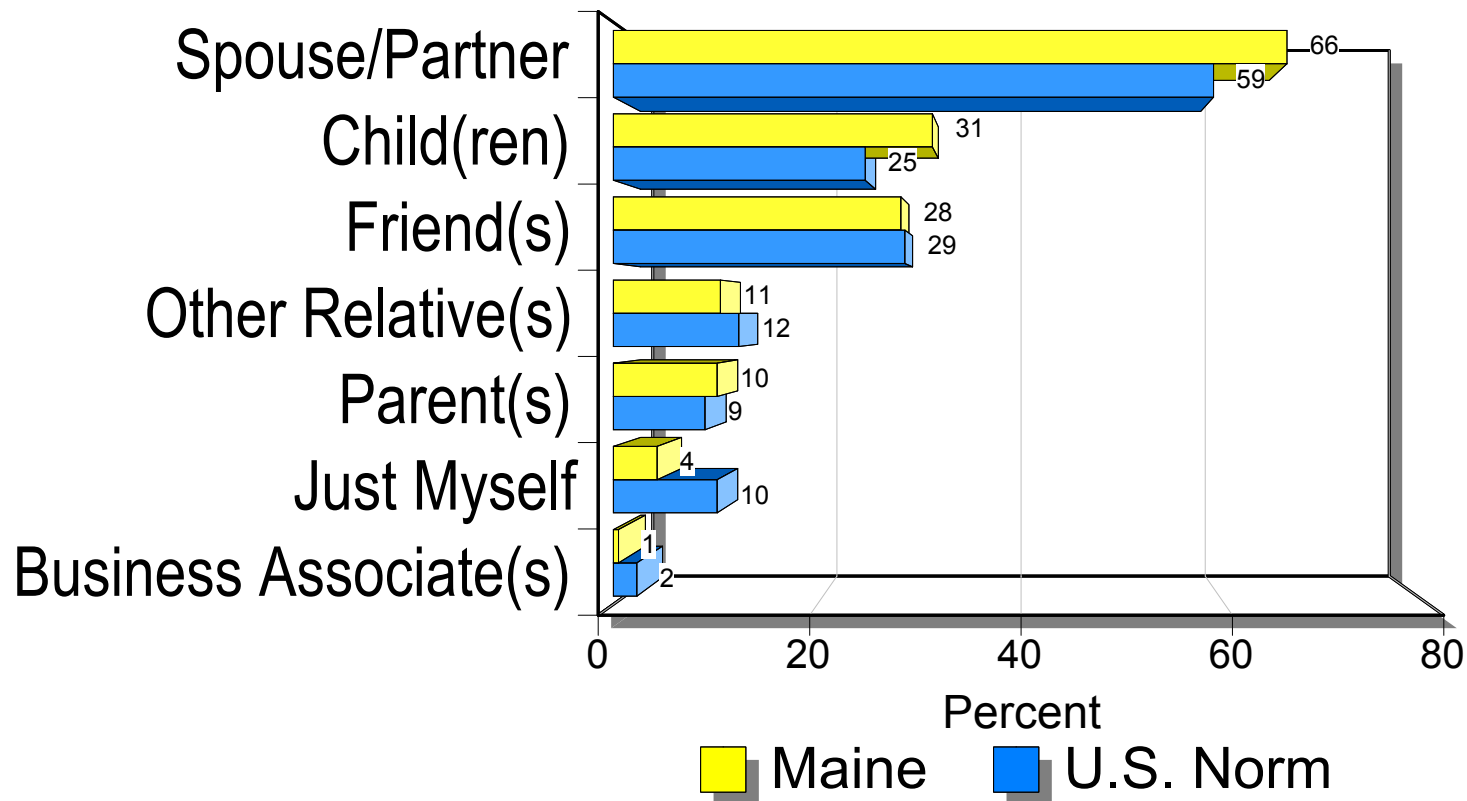


Composition of Travel Party

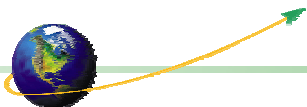


2002 Travel Year

Base: Overnight Marketable Trips

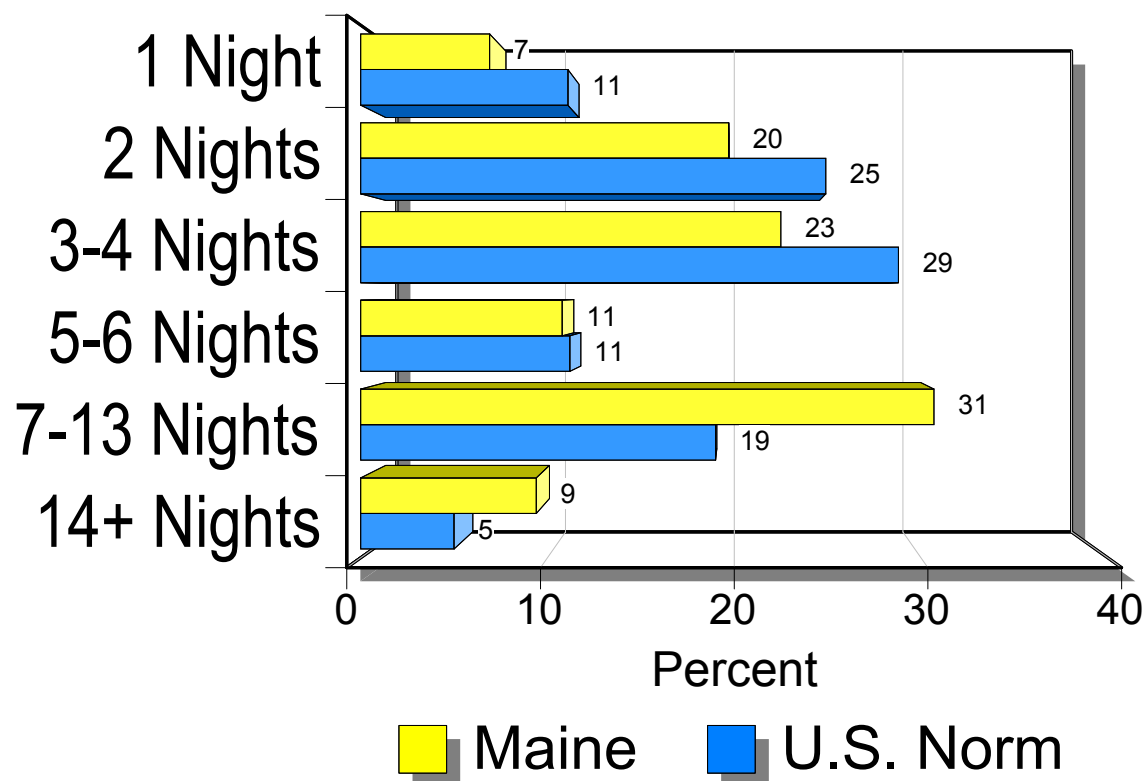


Total Nights A w a y



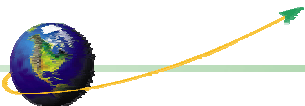
2002 Travel Year

Base: Overnight Marketable Trips



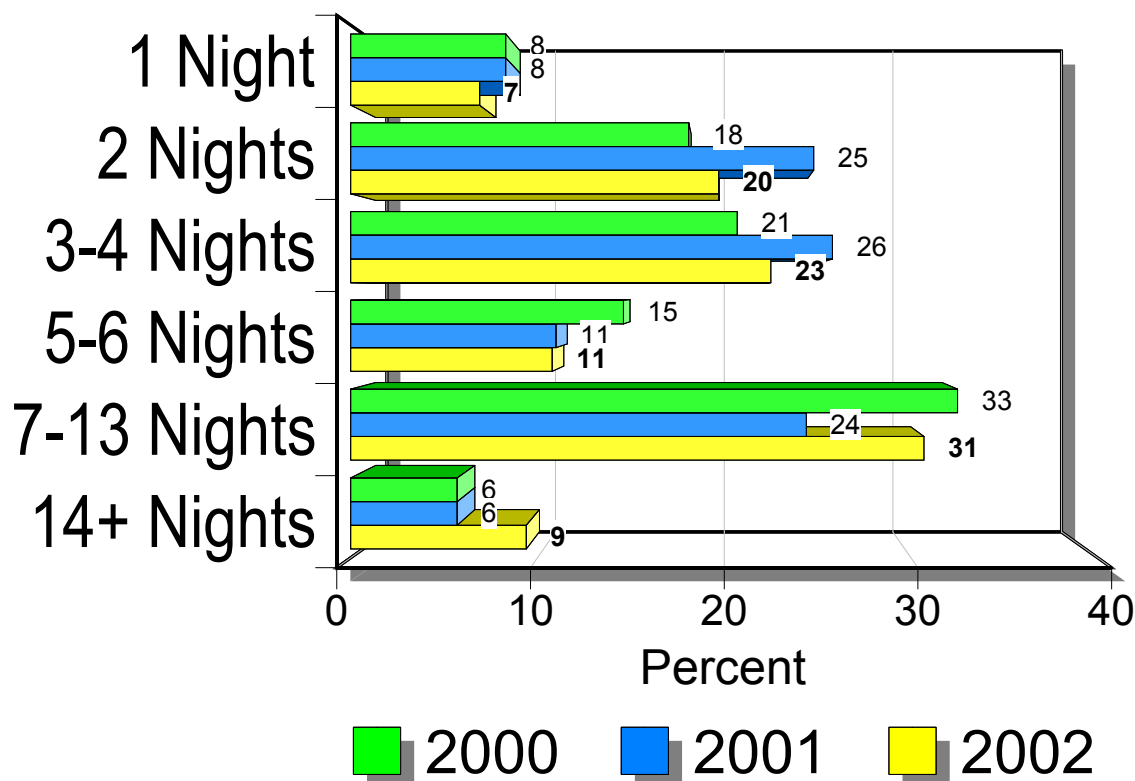
	<u>Maine</u>	<u>U.S. Norm</u>
Average Number of Nights	6.6	4.8

Total Nights Away on Maine Trips



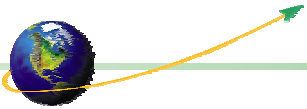
2002 Travel Year

Base: Overnight Marketable Trips



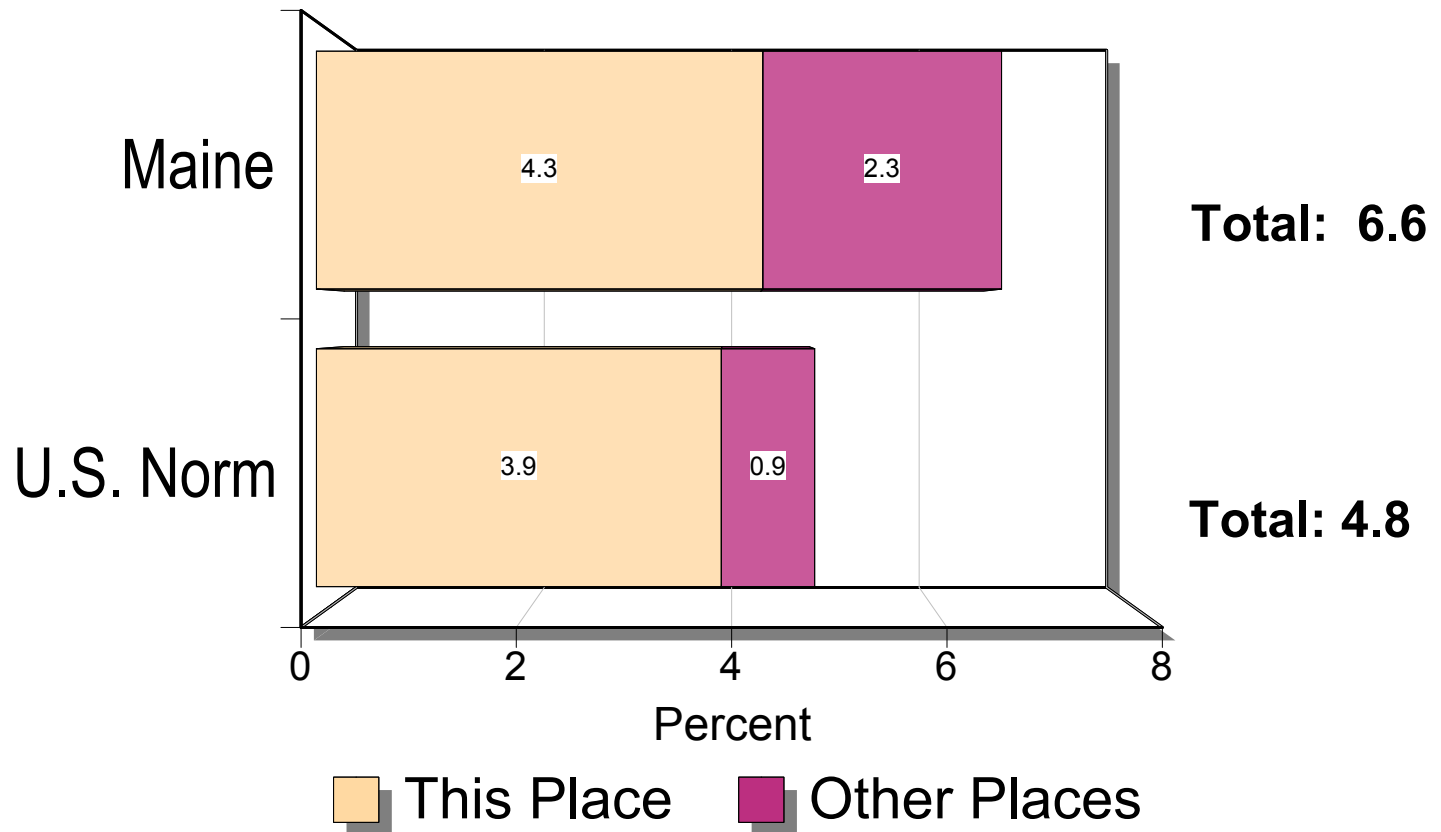
Average Number of Nights	6.0	5.5	6.6
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Length of Stay

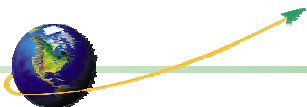


2002 Travel Year

Base: Overnight Marketable Trips

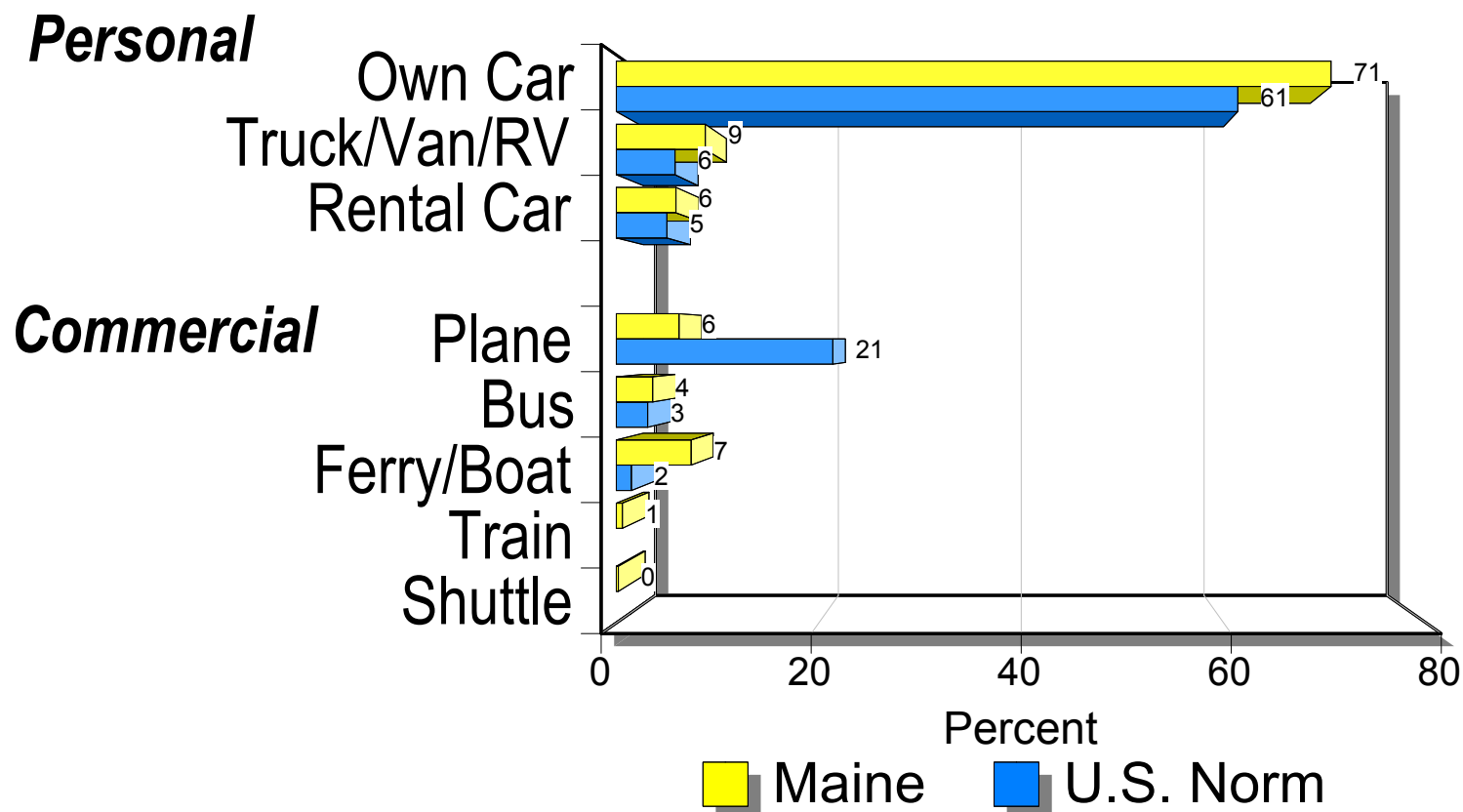


Transportation Used to Enter Maine

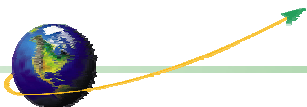


2002 Travel Year

Base: Overnight Marketable Trips from Out-of-state

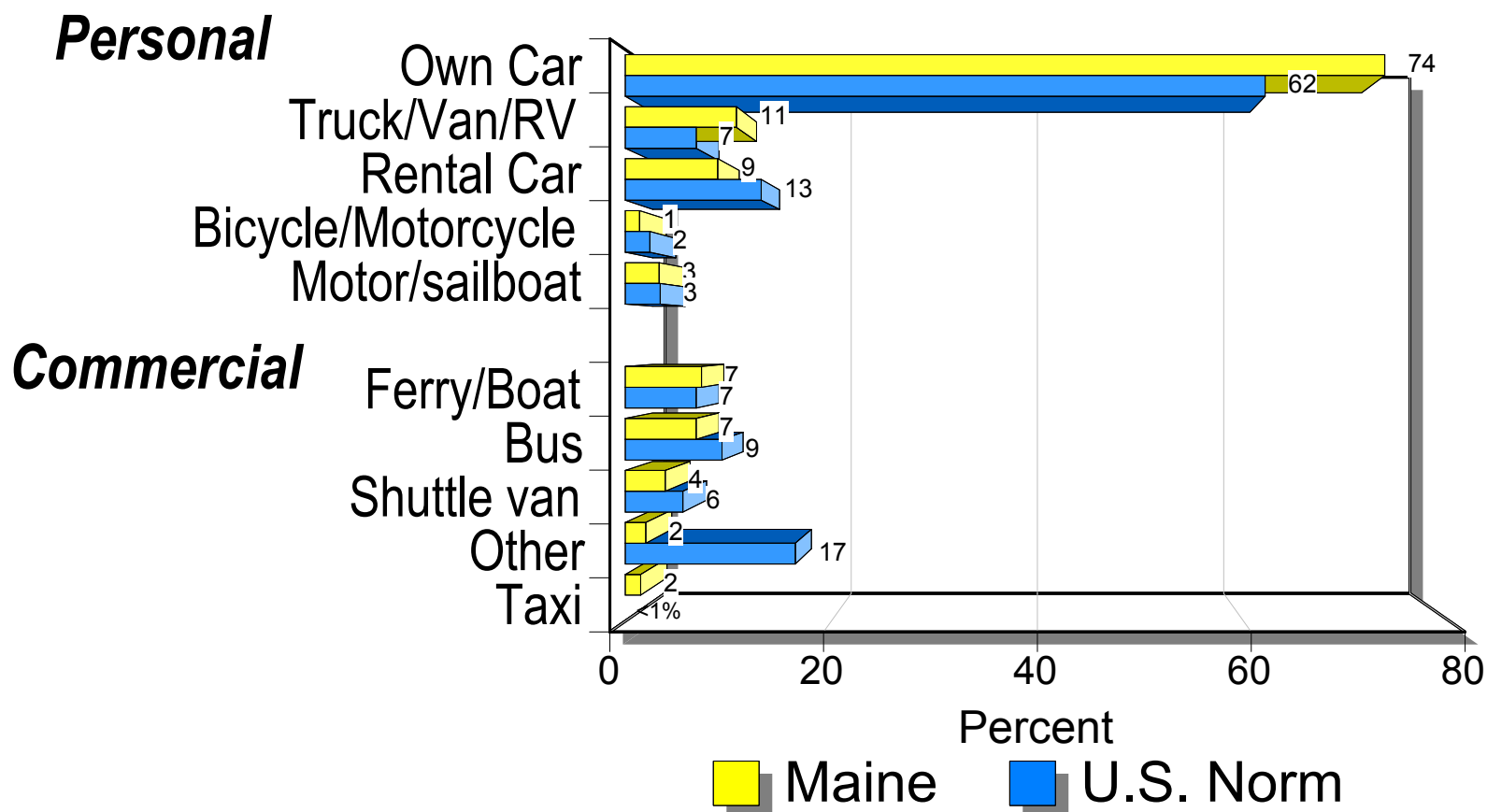


Transportation Used in Maine

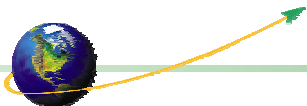


2002 Travel Year

Base: Overnight Marketable Trips

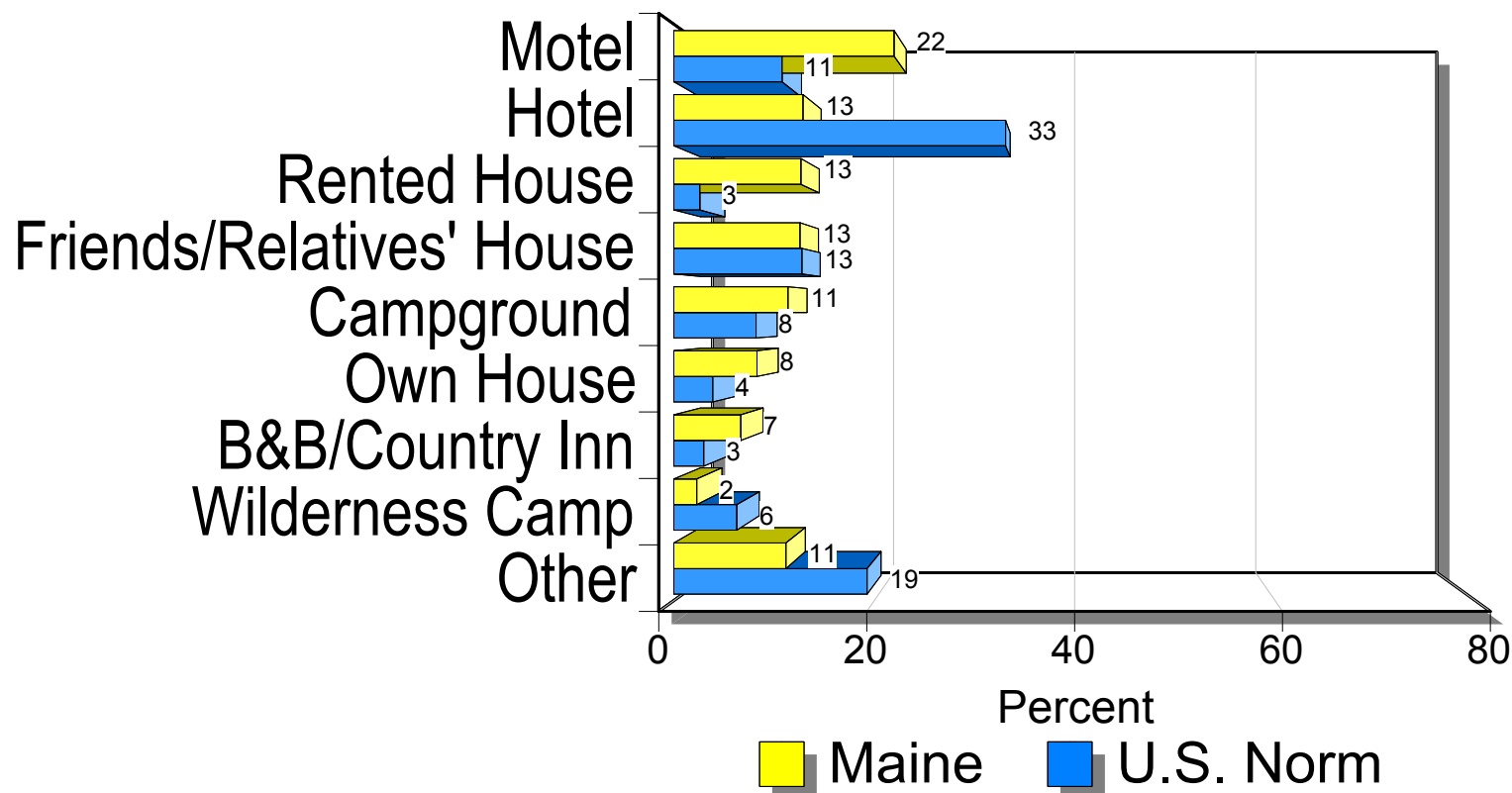


Accommodations Used*



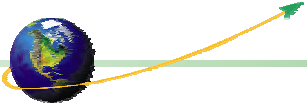
2002 Travel Year

Base: Overnight Marketable Trips



* Percent of trip nights spent in each type of accommodation

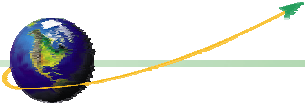
Trip Activities and Experiences



2002 Travel Year

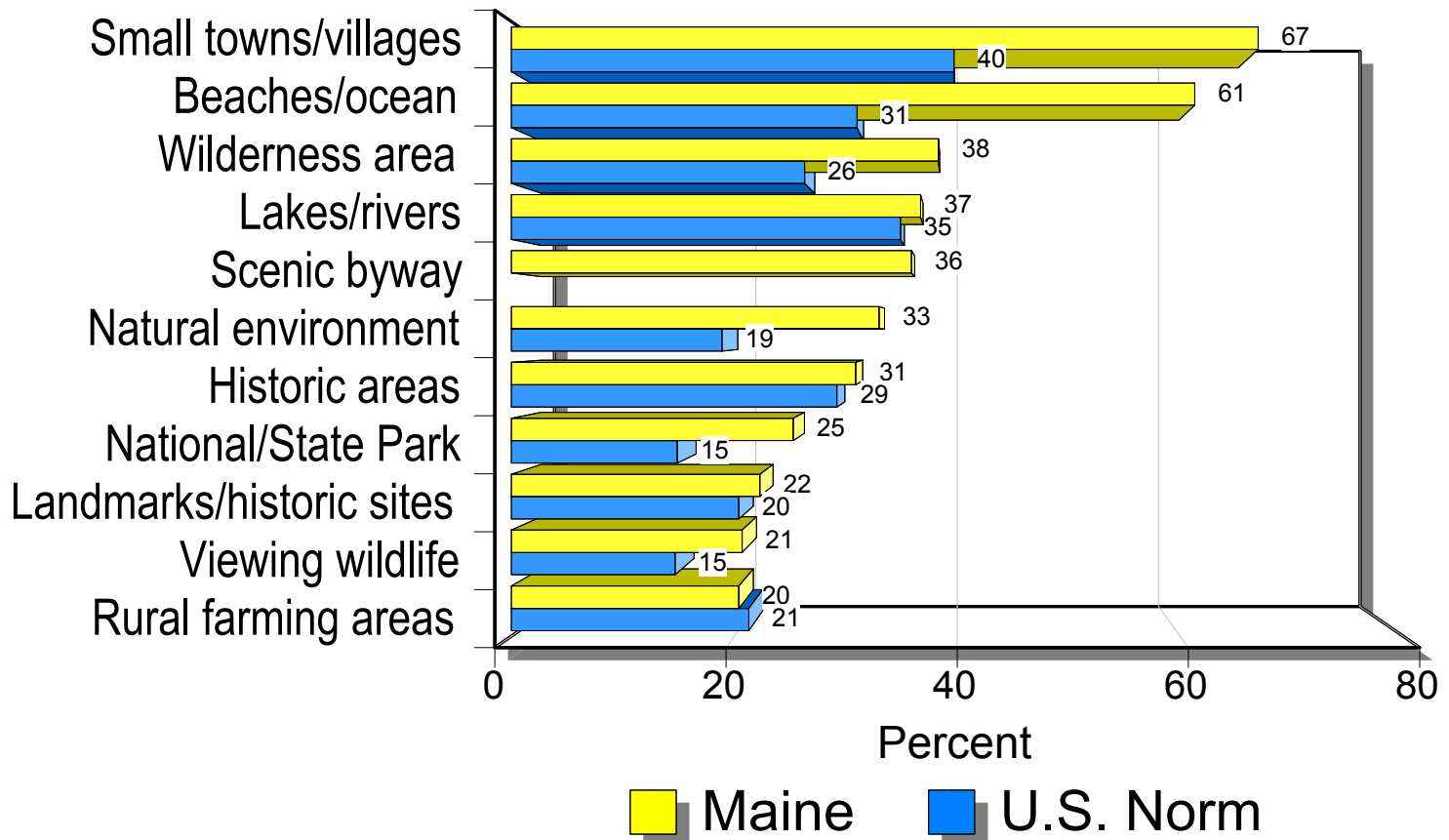
- ◉ The most popular experiences on Maine trips were:
 - ◉ *visiting small towns/villages (67%)*
 - ◉ *the beach/ocean (61%)*
 - ◉ *eating a lobster (40%) and the unique local foods (35%)*
 - ◉ *wilderness areas (38%), lakes and rivers (37%), and scenic byways (36%)*
 - ◉ *shopping for gifts and souvenirs (42%).*

Sightseeing



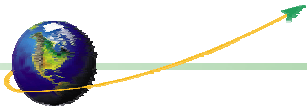
2002 Travel Year

Base: Overnight Marketable Trips



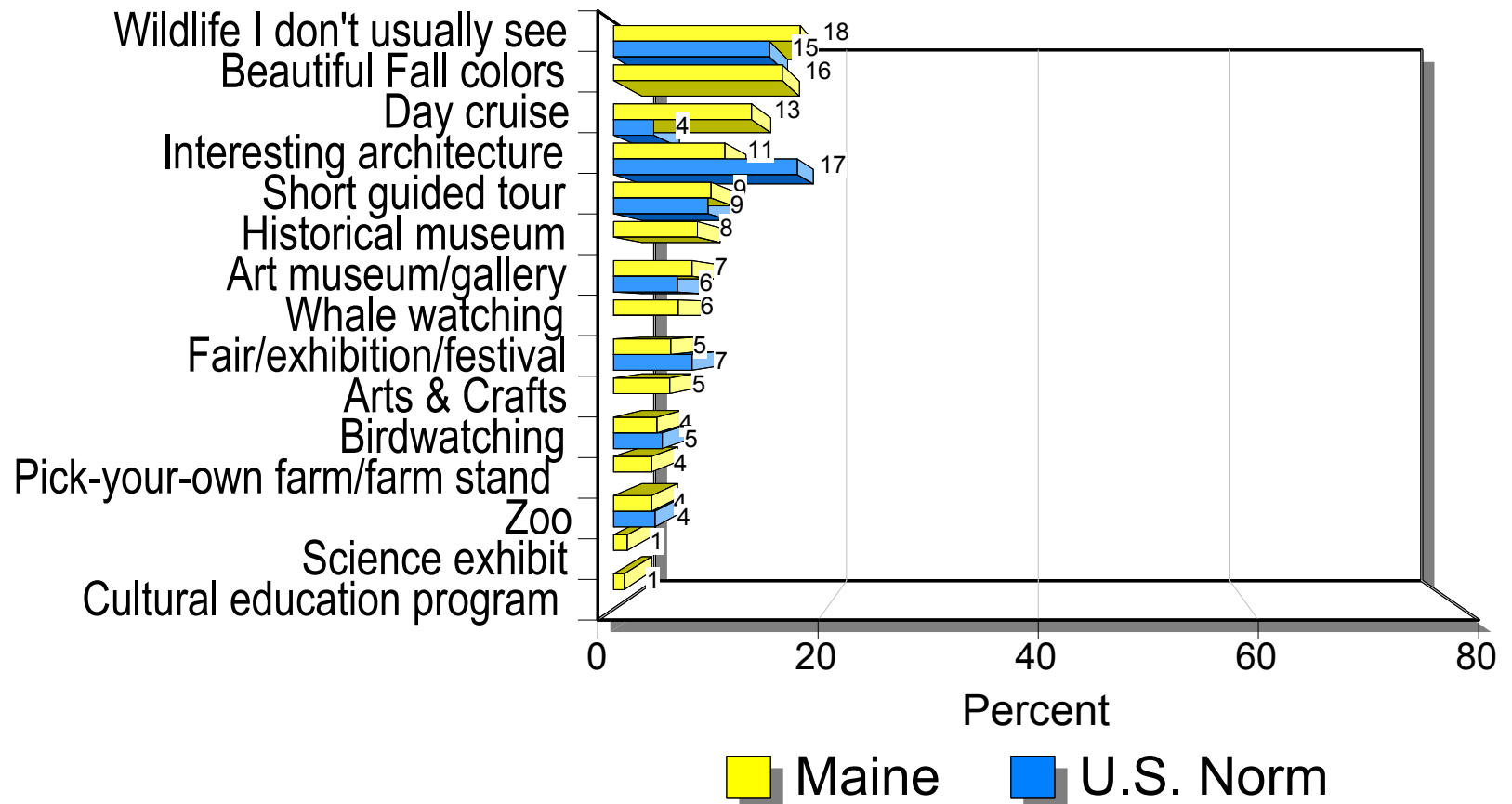
Note: Where U.S. Norm is blank, the Norm is not available.

Sightseeing cont'd



2002 Travel Year

Base: Overnight Marketable Trips



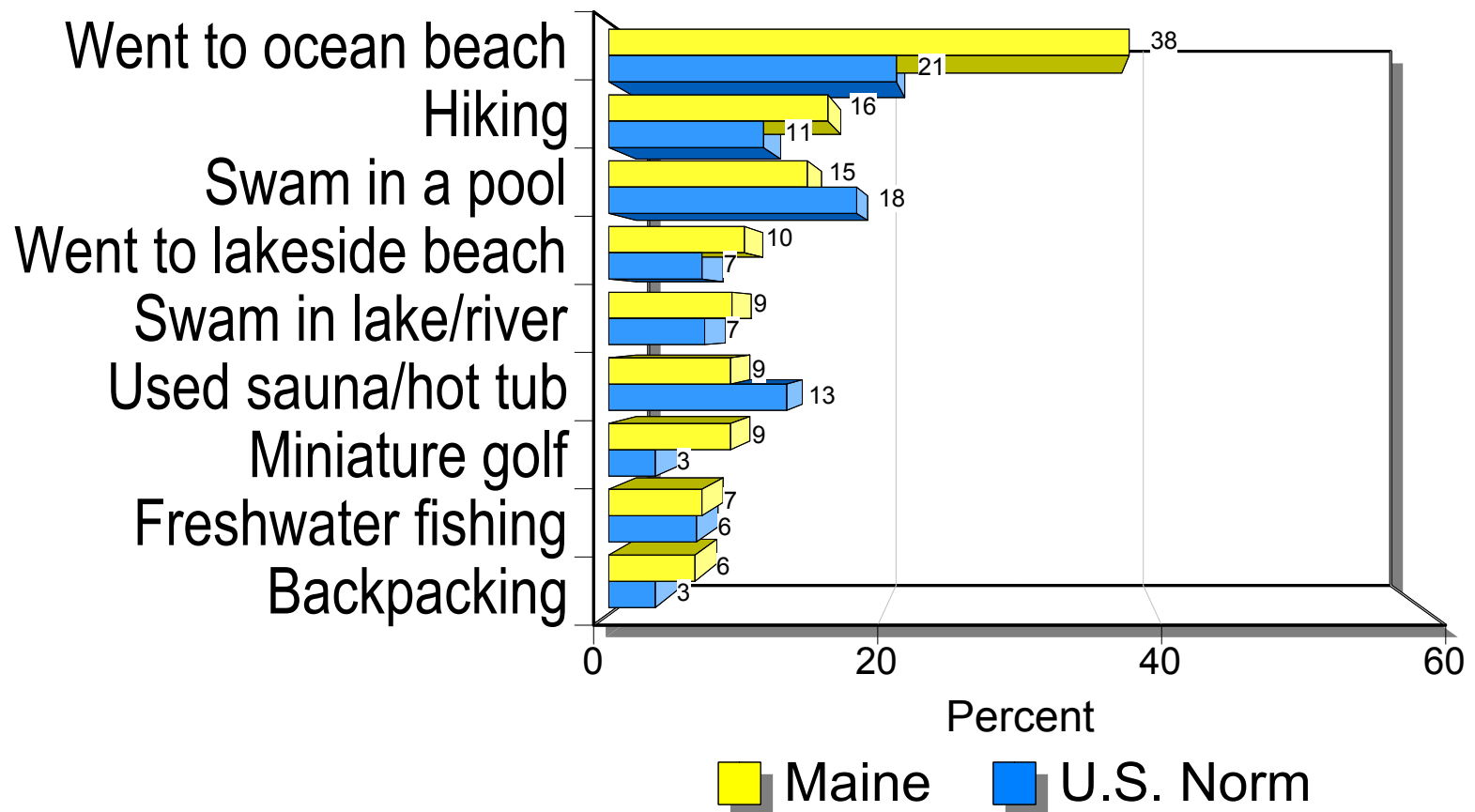
Note: Where U.S. Norm is blank, the Norm is not available.

Sports & Recreation



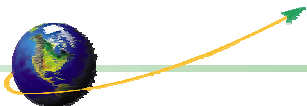
2002 Travel Year

Base: Overnight Marketable Trips



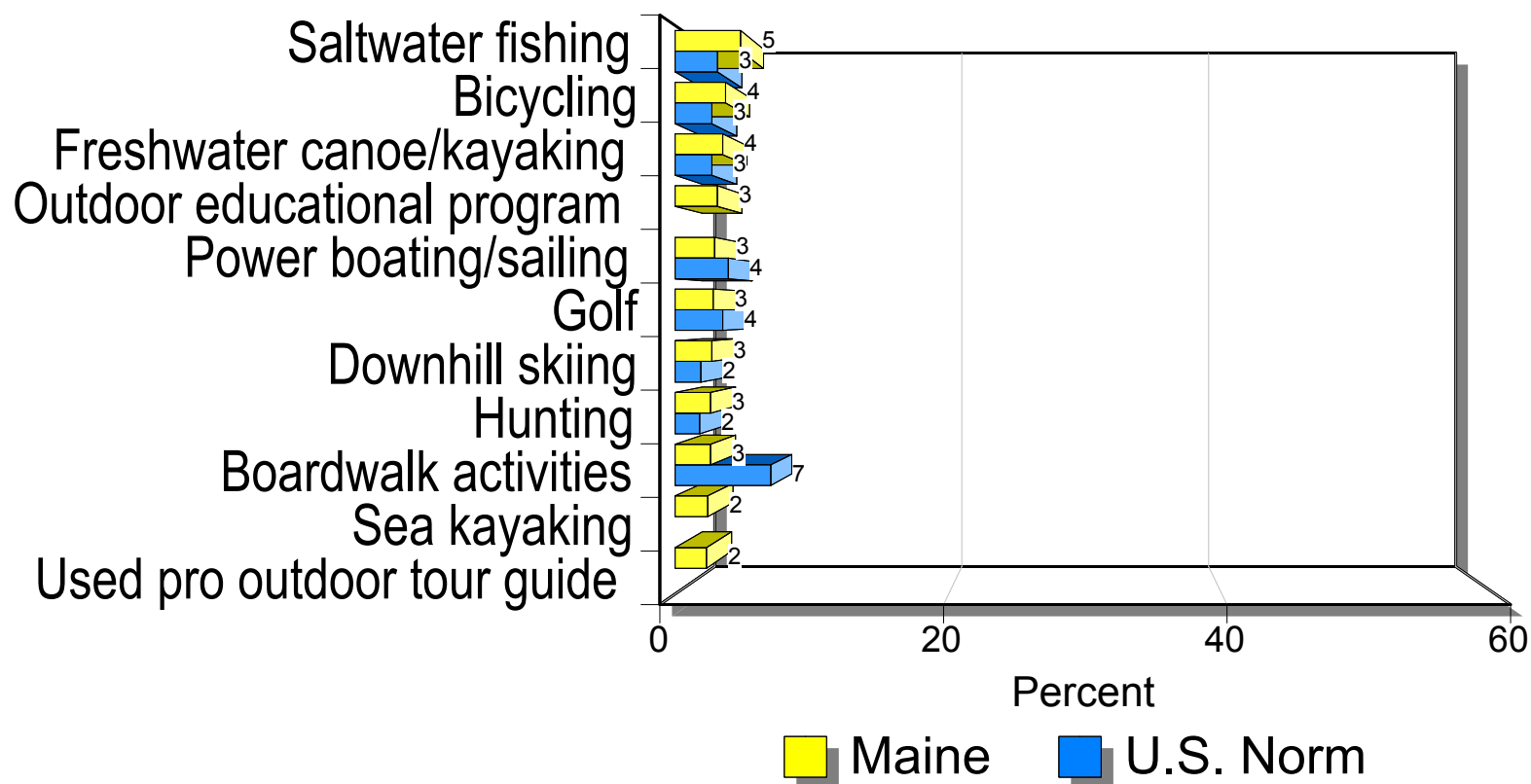
Note: Where U.S. Norm is blank, the Norm is not available.

Sports & Recreation cont'd



2002 Travel Year

Base: Overnight Marketable Trips



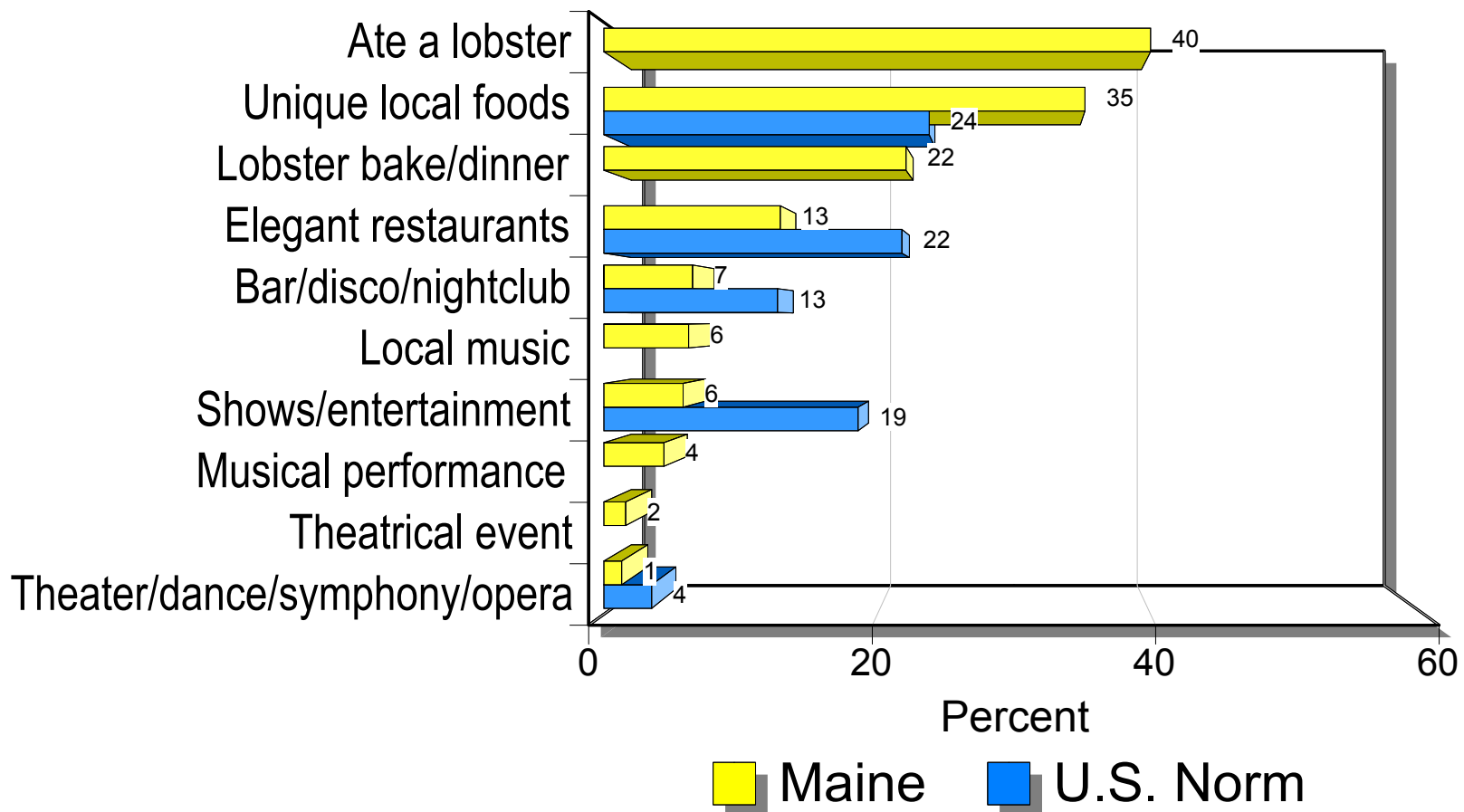
Note: Where U.S. Norm is blank, the Norm is not available.

Dining & Entertainment



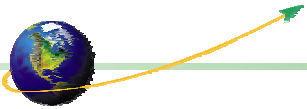
2002 Travel Year

Base: Overnight Marketable Trips



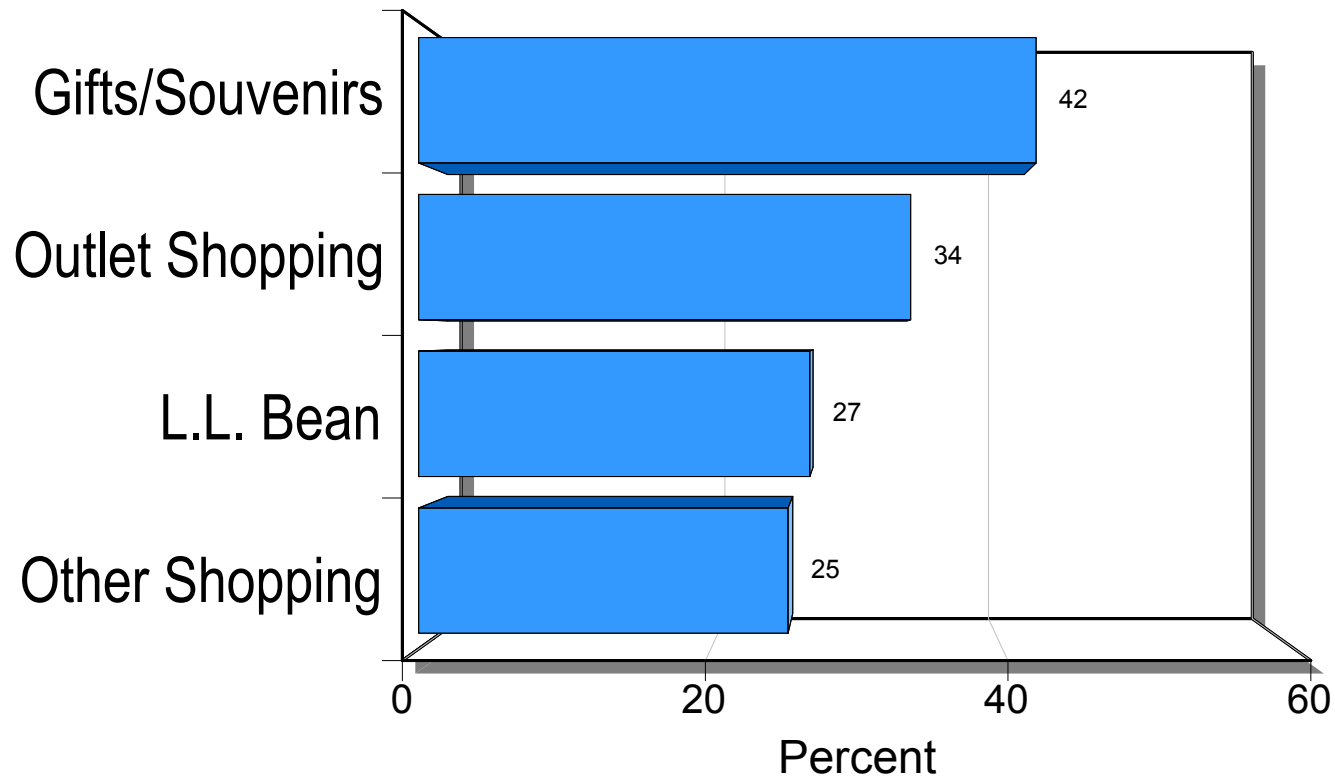
Note: Where U.S. Norm is blank, the Norm is not available.

Shopping

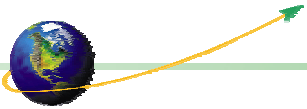


2002 Travel Year

Base: Overnight Marketable Trips

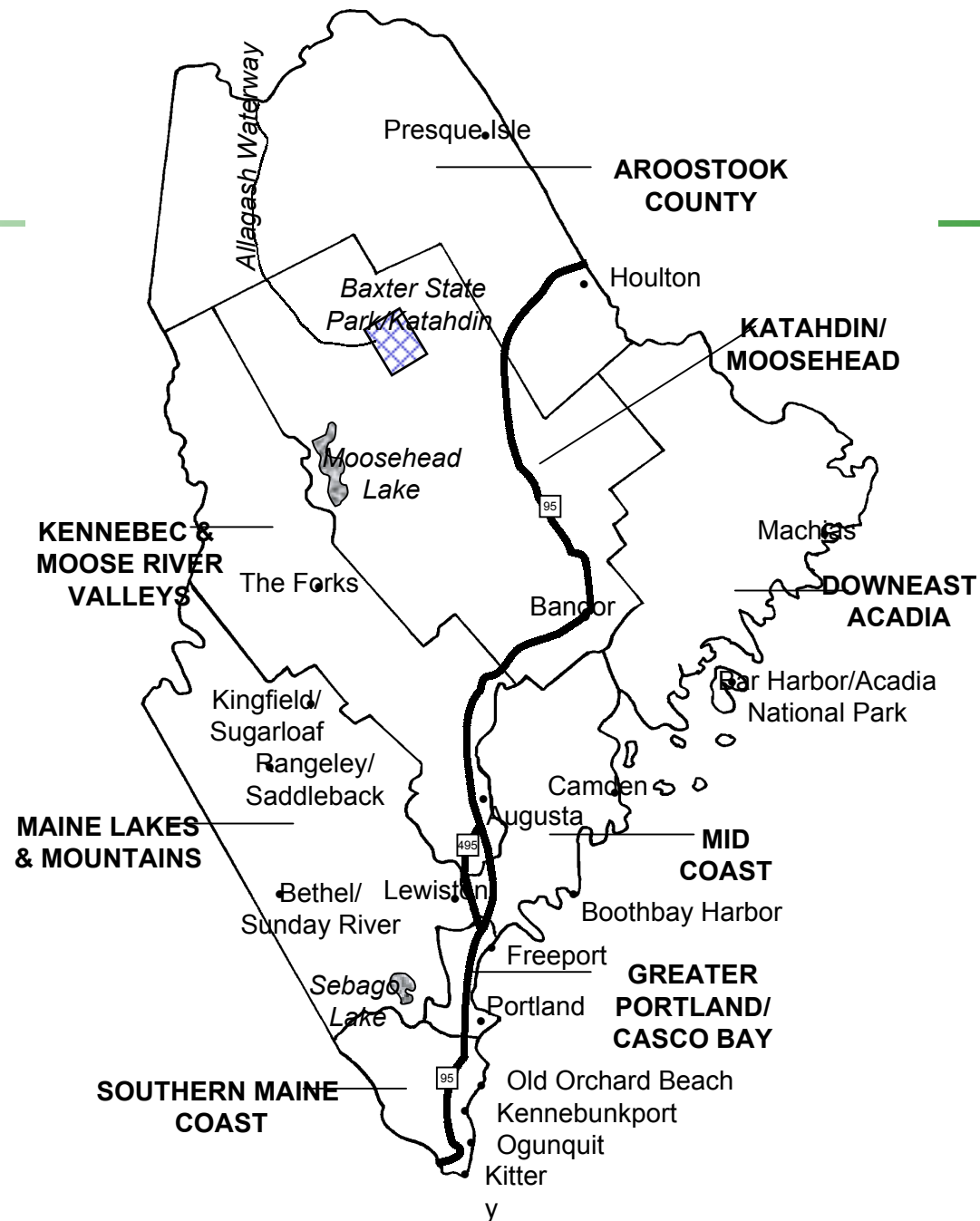


Regions Visited

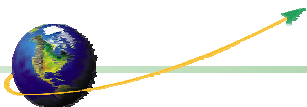


2002 Travel Year

- ⊙ The most frequently visited regions within Maine were, in rank order:
 - ⊙ *the Southern Maine Coast, Greater Portland/Casco Bay, and Downeast Acadia (ranging from 42% to 33%);*
 - ⊙ *Mid-Coast, Maine Lakes & Mountains, and the Maine Highlands (ranging from 20% to 13%); and ...*
 - ⊙ *Kennebec & Moose River Valleys and Aroostook (ranging from 6% to 5%).*
- ⊙ The two leading main regional destinations were the Southern Maine Coast (30%) and Downeast Acadia (23%).

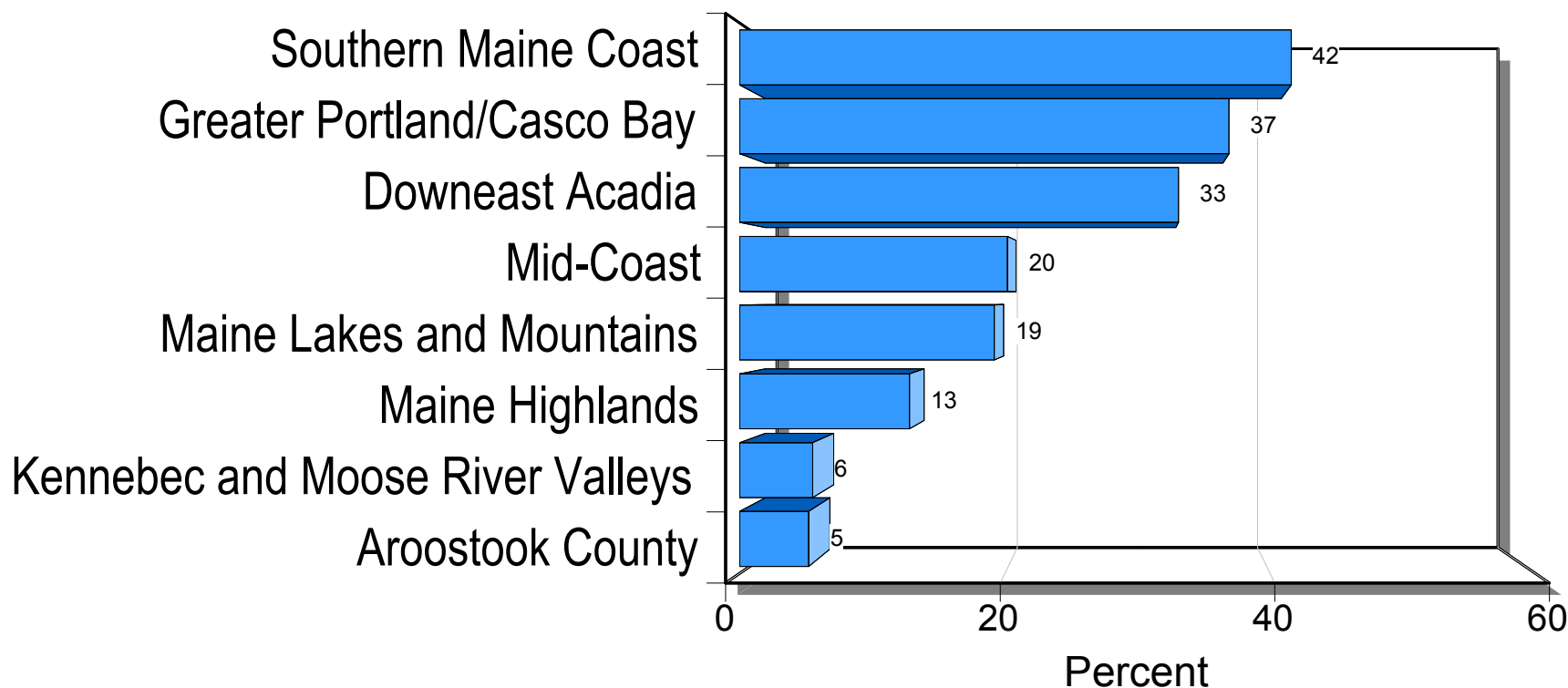


Regions Visited

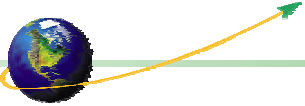


2002 Travel Year

Base: Overnight Marketable Trips

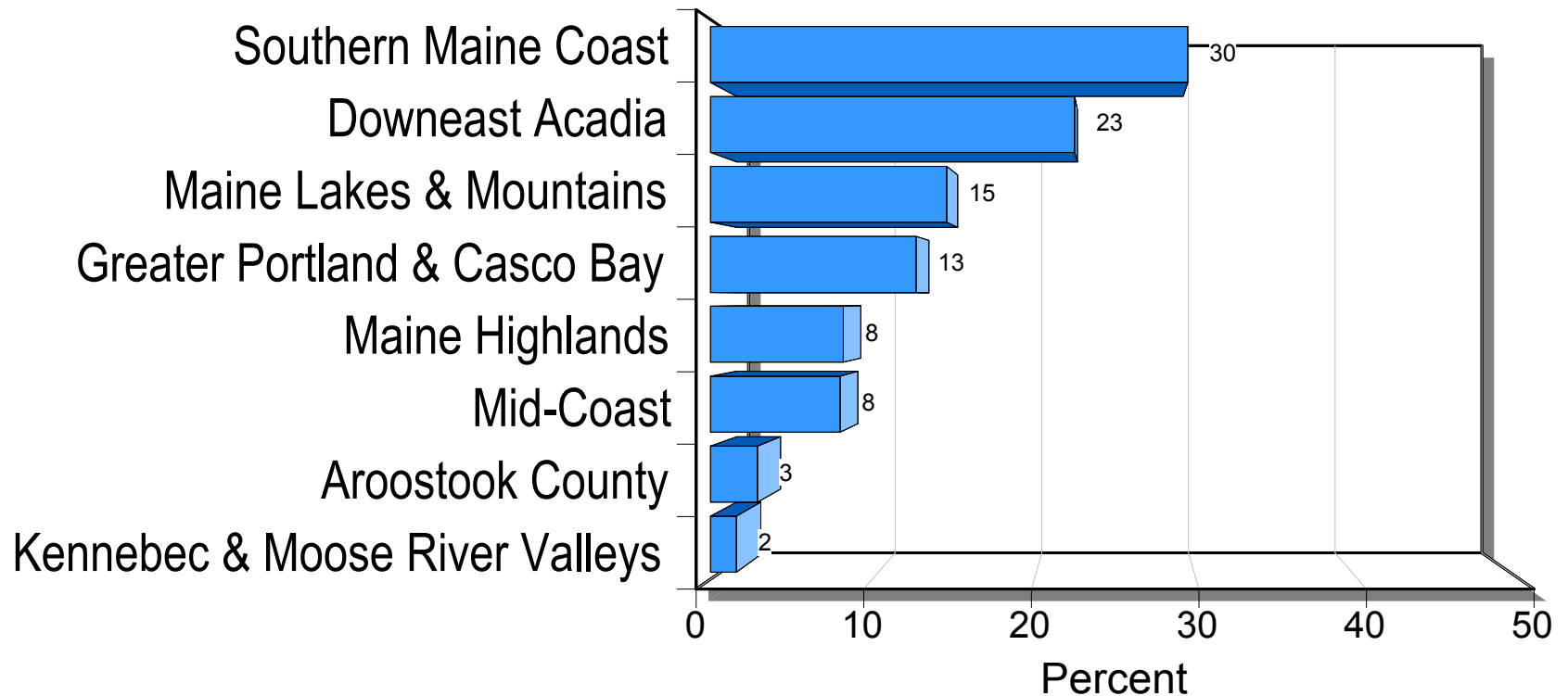


Main Regional Destination

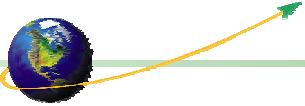


2002 Travel Year

Base: Overnight Marketable Trips

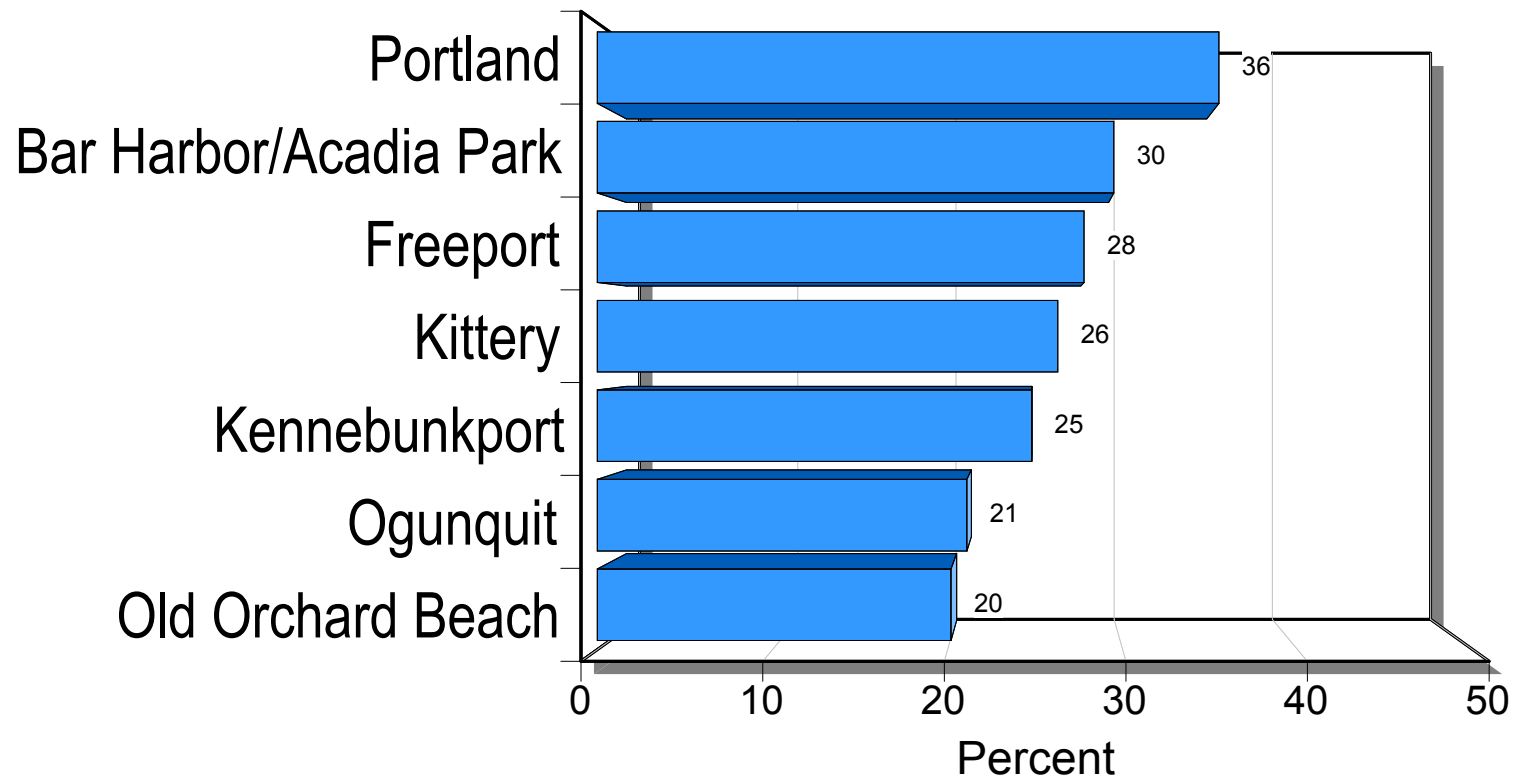


Most Visited Maine Destinations

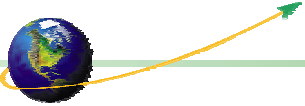


2002 Travel Year

Base: Overnight Marketable Trips

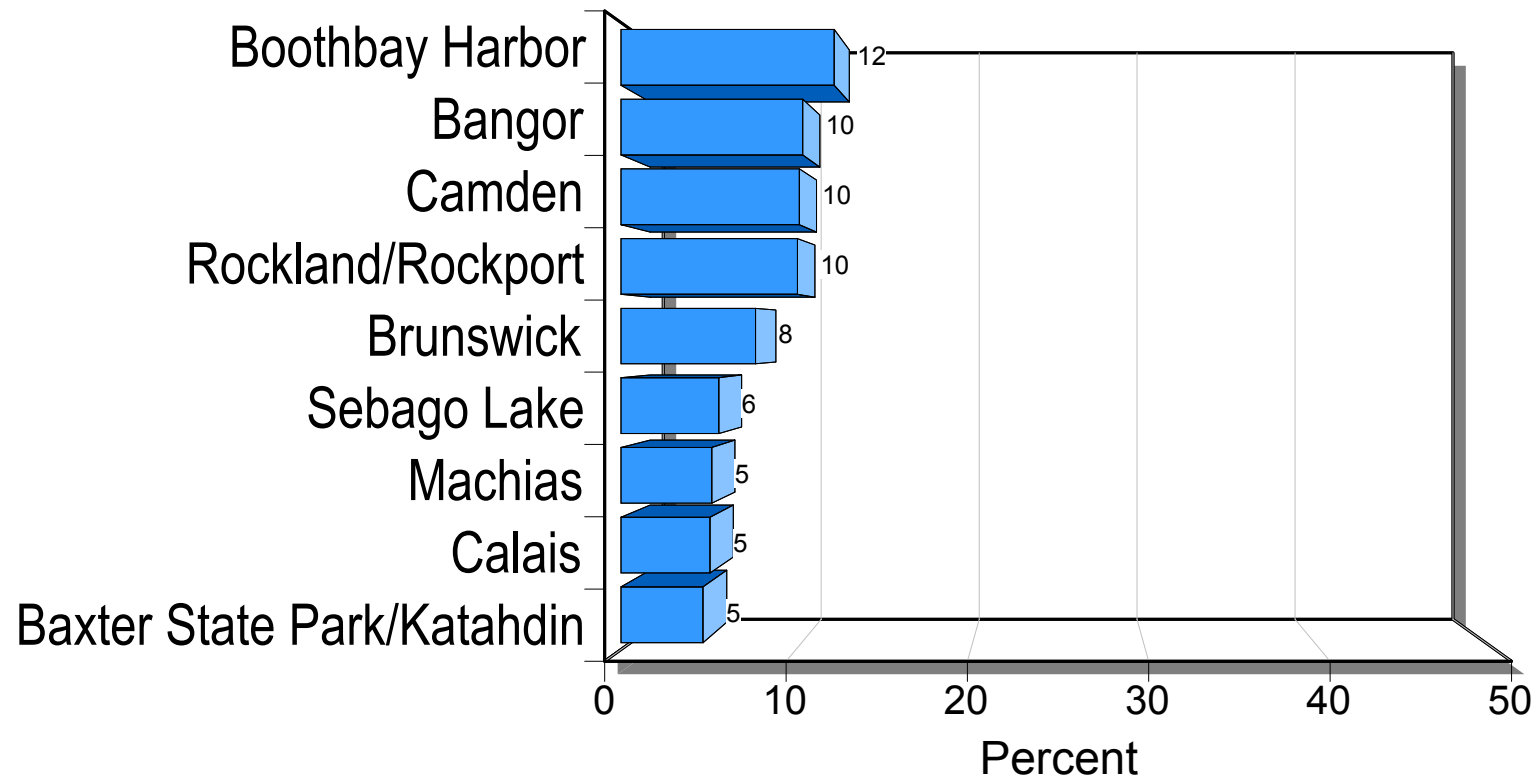


Most Visited Maine Destinations cont'd

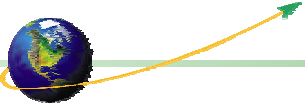


2002 Travel Year

Base: Overnight Marketable Trips

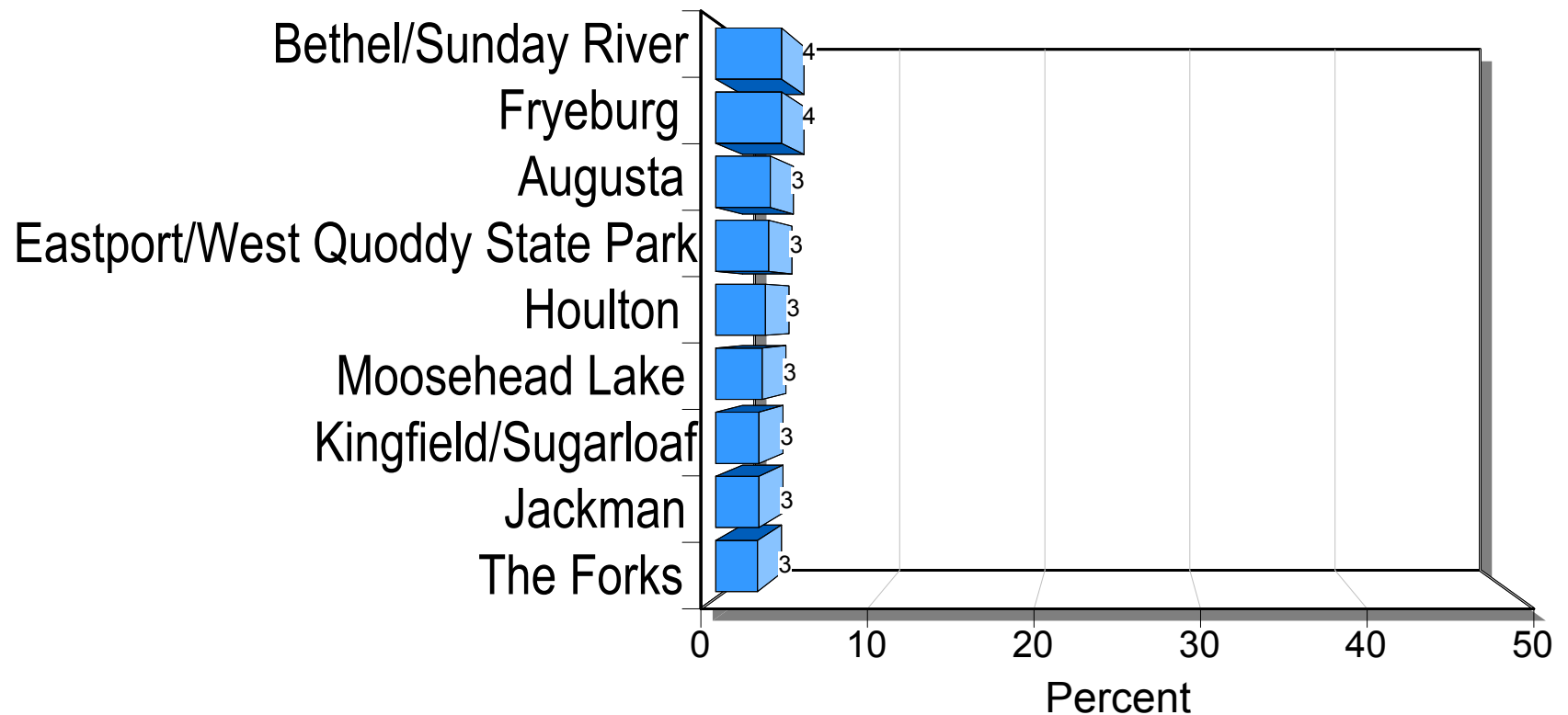


Other Maine Destinations Visited

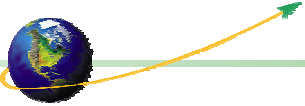


2002 Travel Year

Base: Overnight Marketable Trips

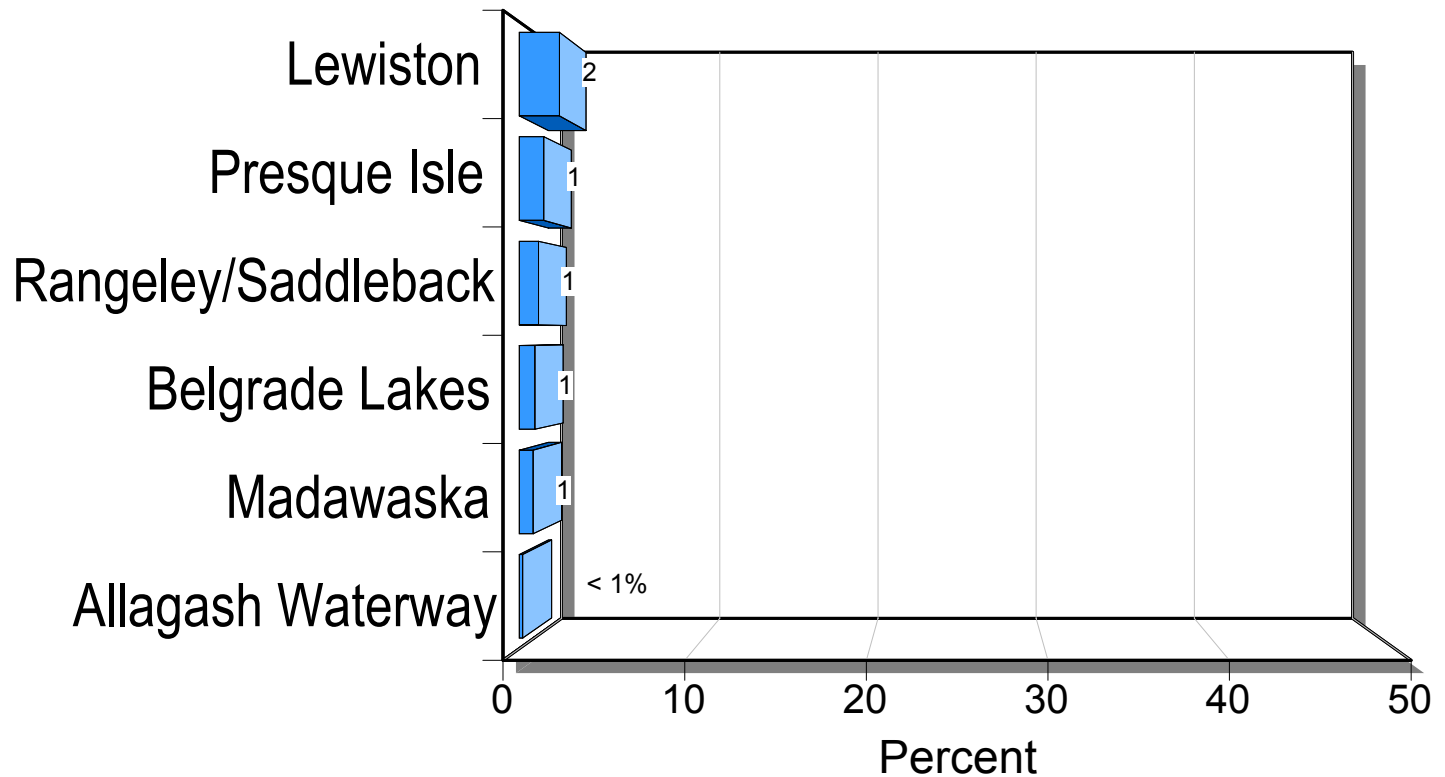


Other Maine Destinations Visited cont'd



2002 Travel Year

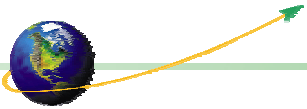
Base: Overnight Marketable Trips



Product Delivery

Impression of Visitors

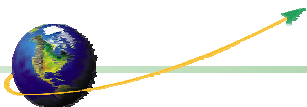
Product Delivery



2002 Travel Year

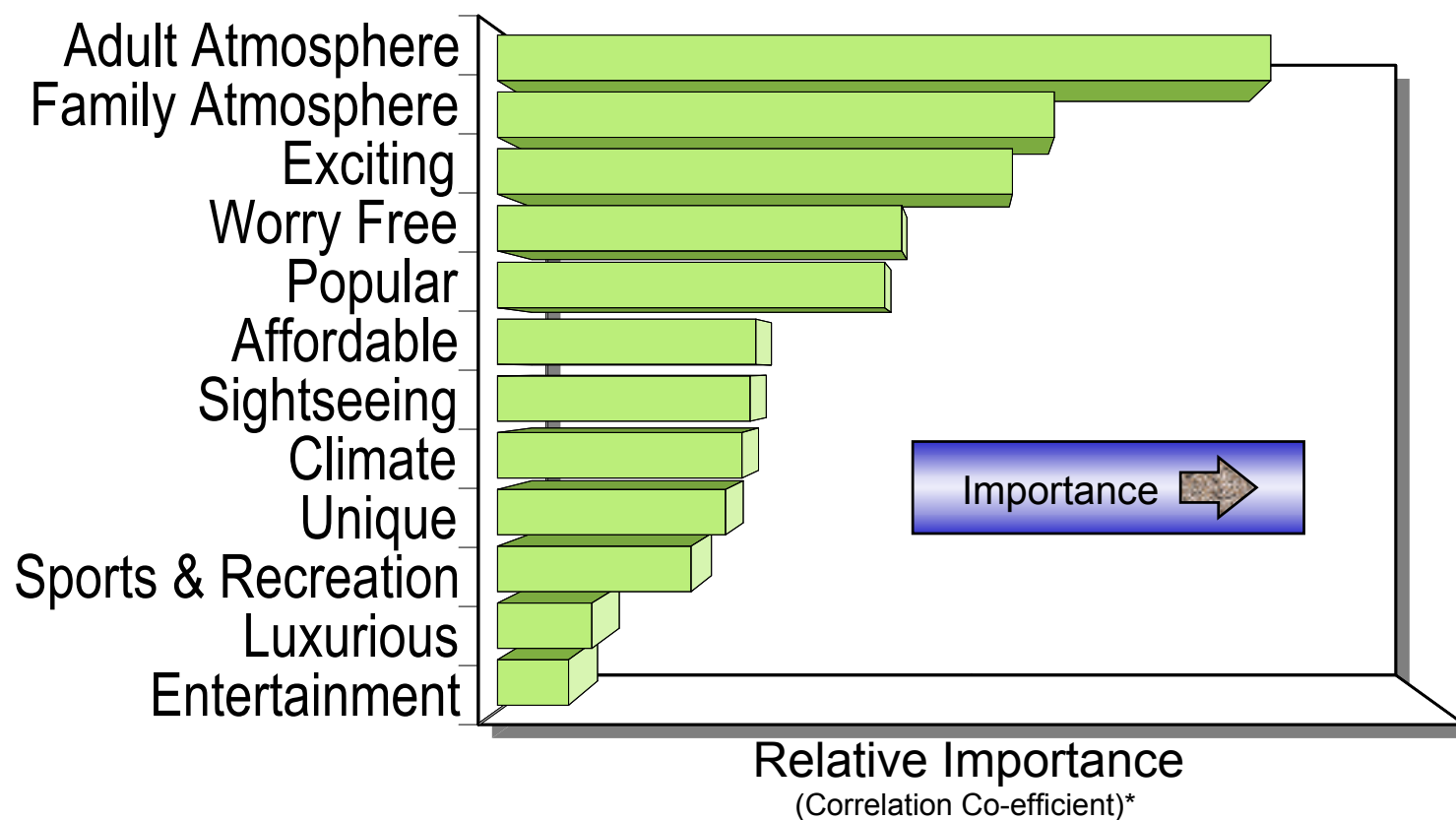
- ◉ *In order to profile Maine's product delivery, ratings of Maine by its recent visitors are compared to the U.S. Norm rating across all destinations and their recent visitors.*
- ◉ *Maine's outperforms the U.S. Norm most notably on:*
 - ◉ *the Family Atmosphere, Exciting, Worry-free, Sightseeing, Unique, and Sports & Recreation factors and on,*
 - ◉ *related individual attributes and particularly those related to outdoor activities and sports.*
- ◉ *It under delivers versus the U.S. Norm most notably on:*
 - ◉ *the Entertainment factor and particularly nightlife.*

Traveler Priorities



2002 Travel Year

Base: Overnight Marketable Trips



* A measure of the degree of correlation between each factor and the attribute "Would really enjoy visiting."

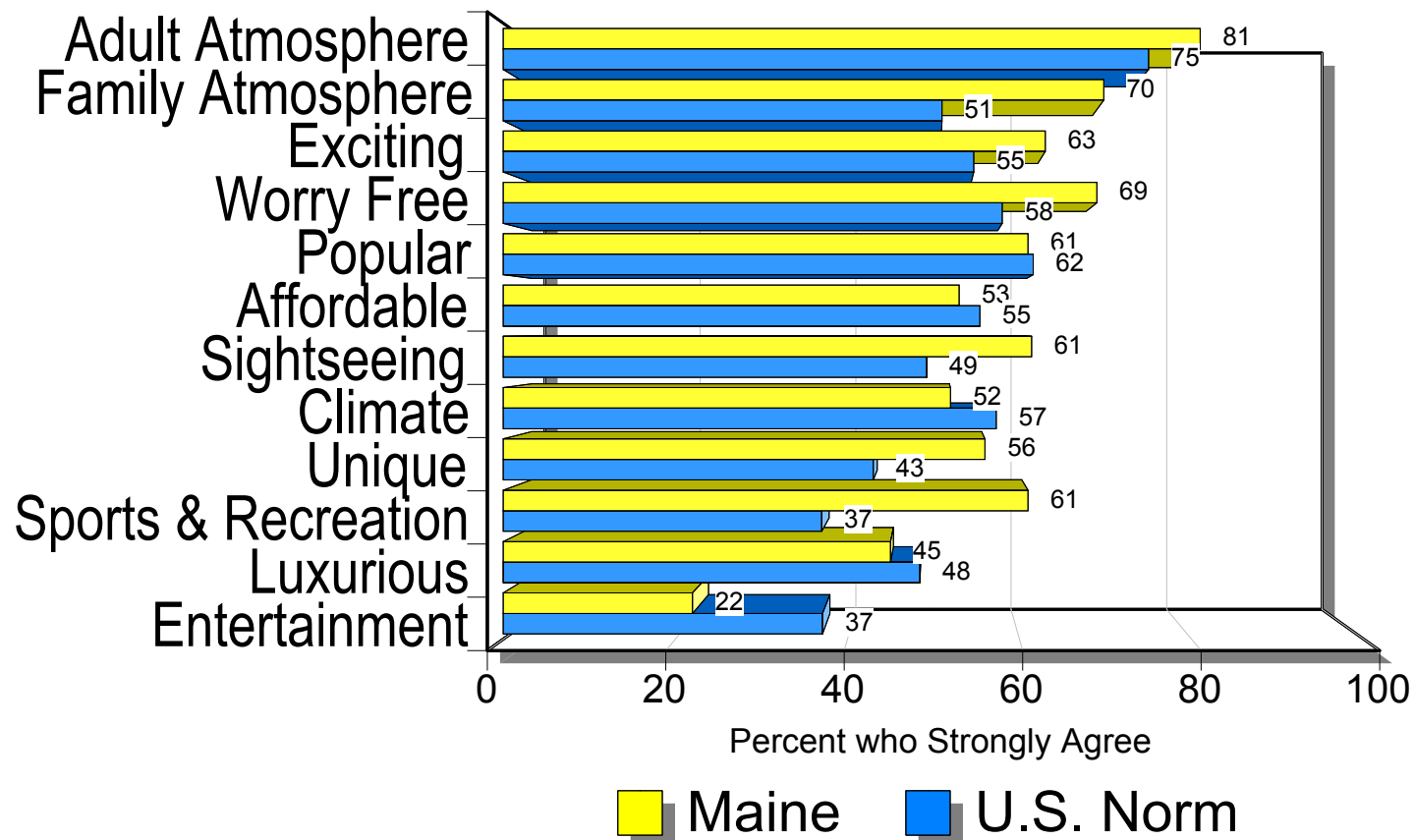
Maine Product Delivery

Overnight Marketable Trips

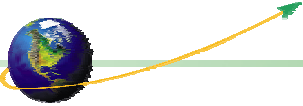


2002 Travel Year

Base: Overnight Marketable Trips

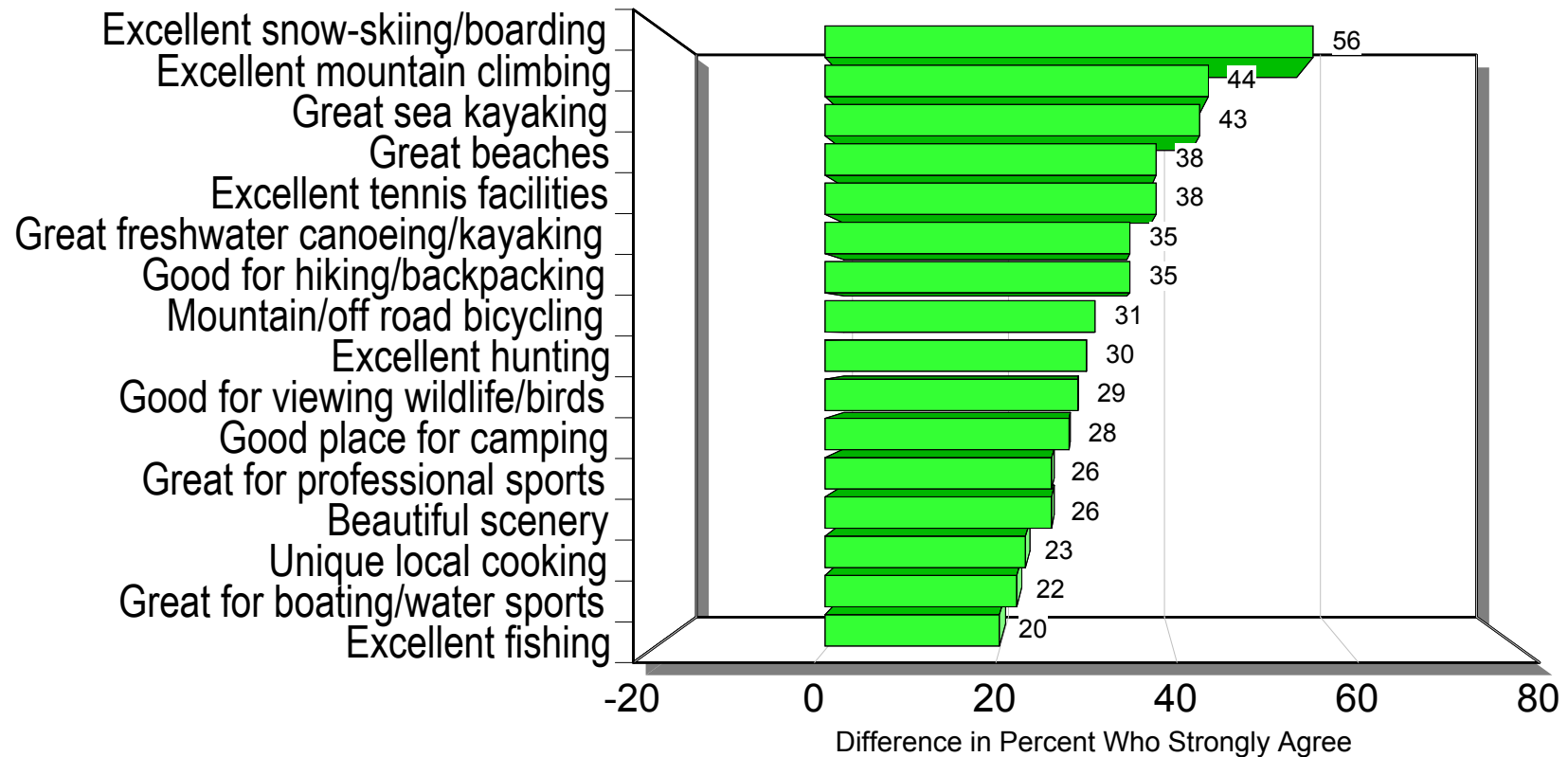


Product Strengths vs. U.S. Norm



2002 Travel Year

Base: Overnight Marketable Trips

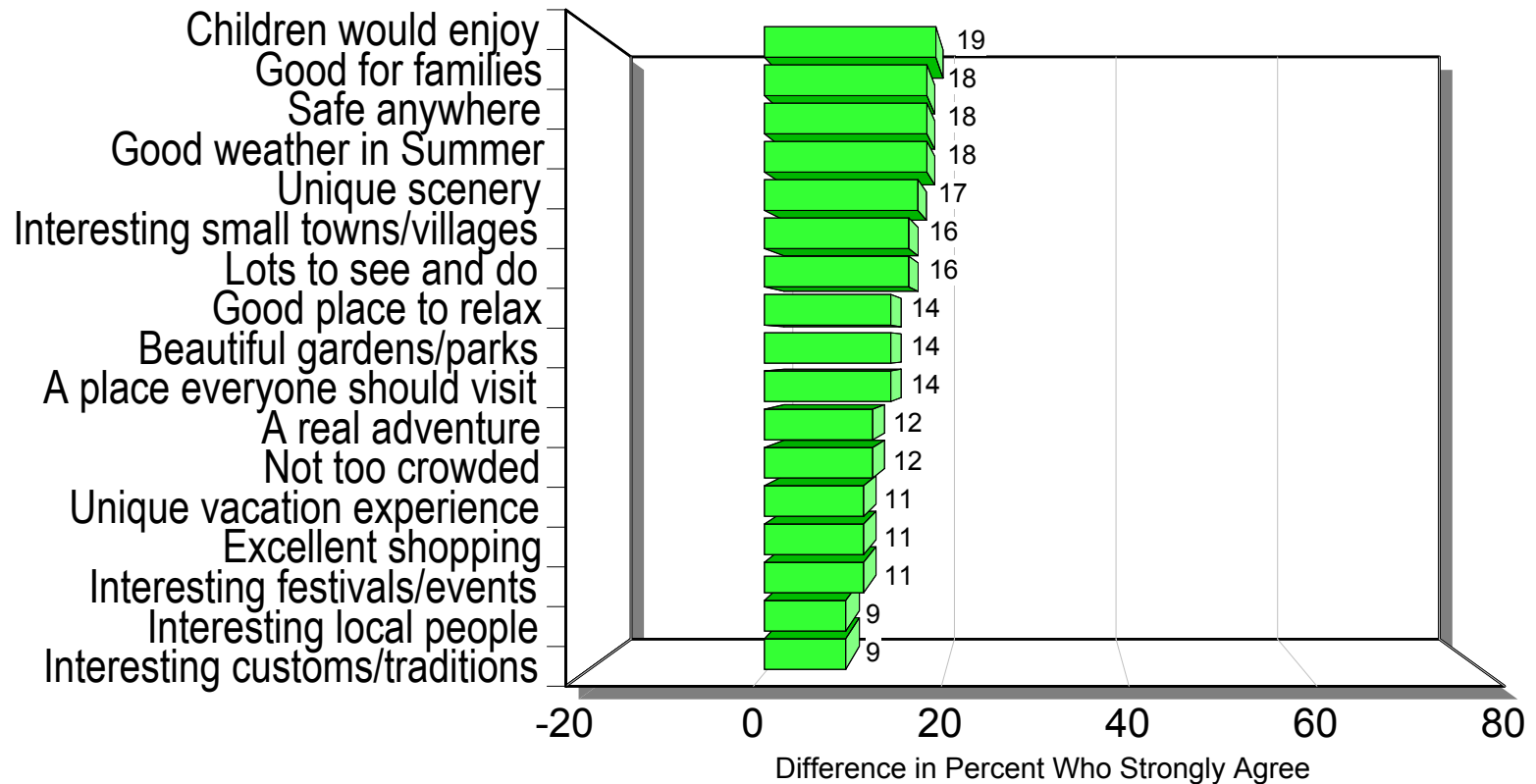


Product Strengths vs. U.S. Norm cont'd

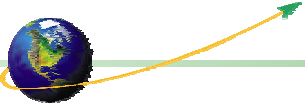


2002 Travel Year

Base: Overnight Marketable Trips



Product Weaknesses vs. U.S. Norm



2002 Travel Year

Base: Overnight Marketable Trips

